

MERLIN

The Quick Start Guide
to professional project management



INTRODUCTION



Welcome to the quick start guide to Merlin!

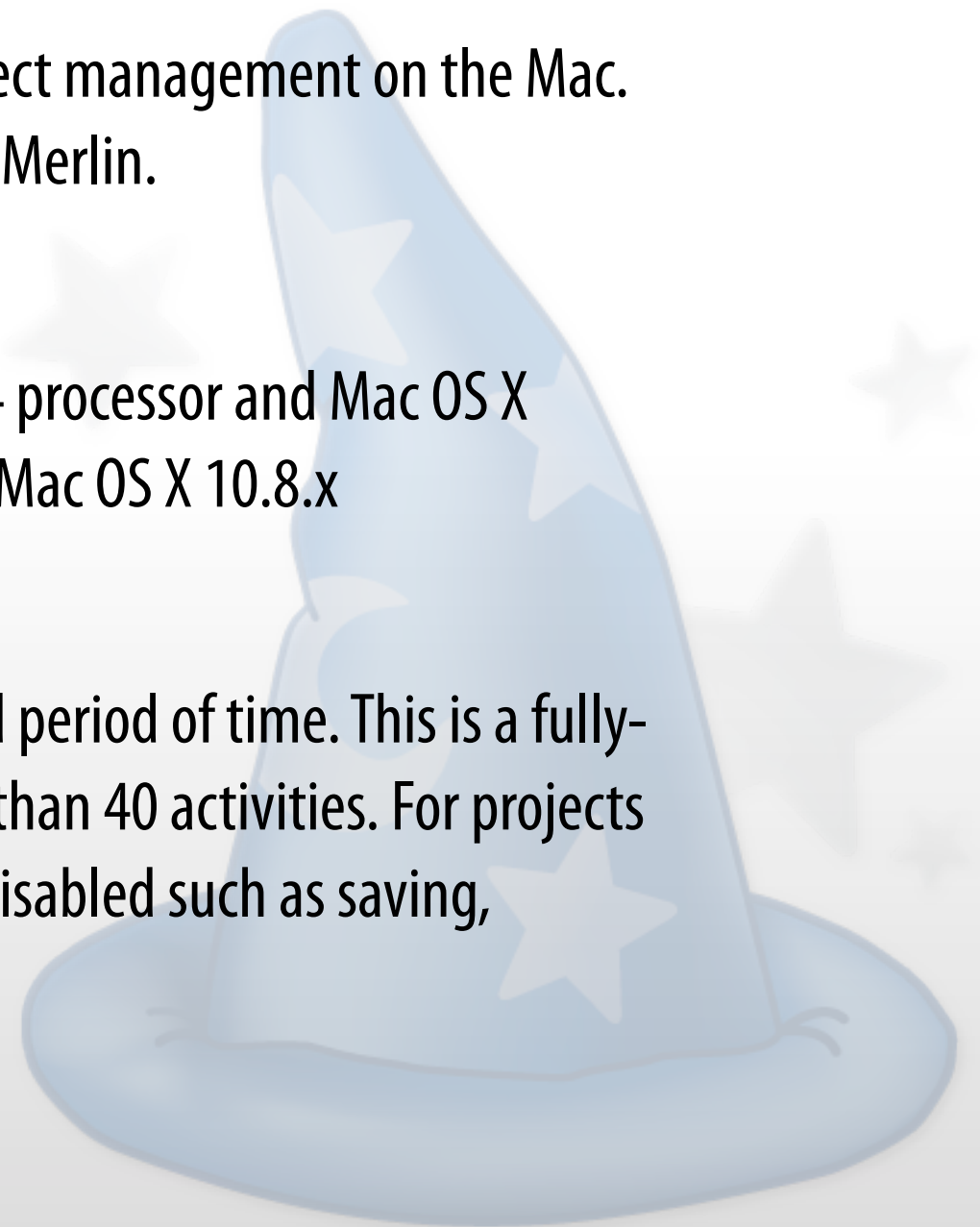
Thank you for choosing the leading software solution for project management on the Mac. This document will introduce you to the basic functionality of Merlin.

System requirements

To run Merlin you need an Apple Macintosh computer with G4 processor and Mac OS X 10.4.11 or newer. We highly recommend the latest version of Mac OS X 10.8.x

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

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

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

Or contact our support team directly: en-support@merlin2.net

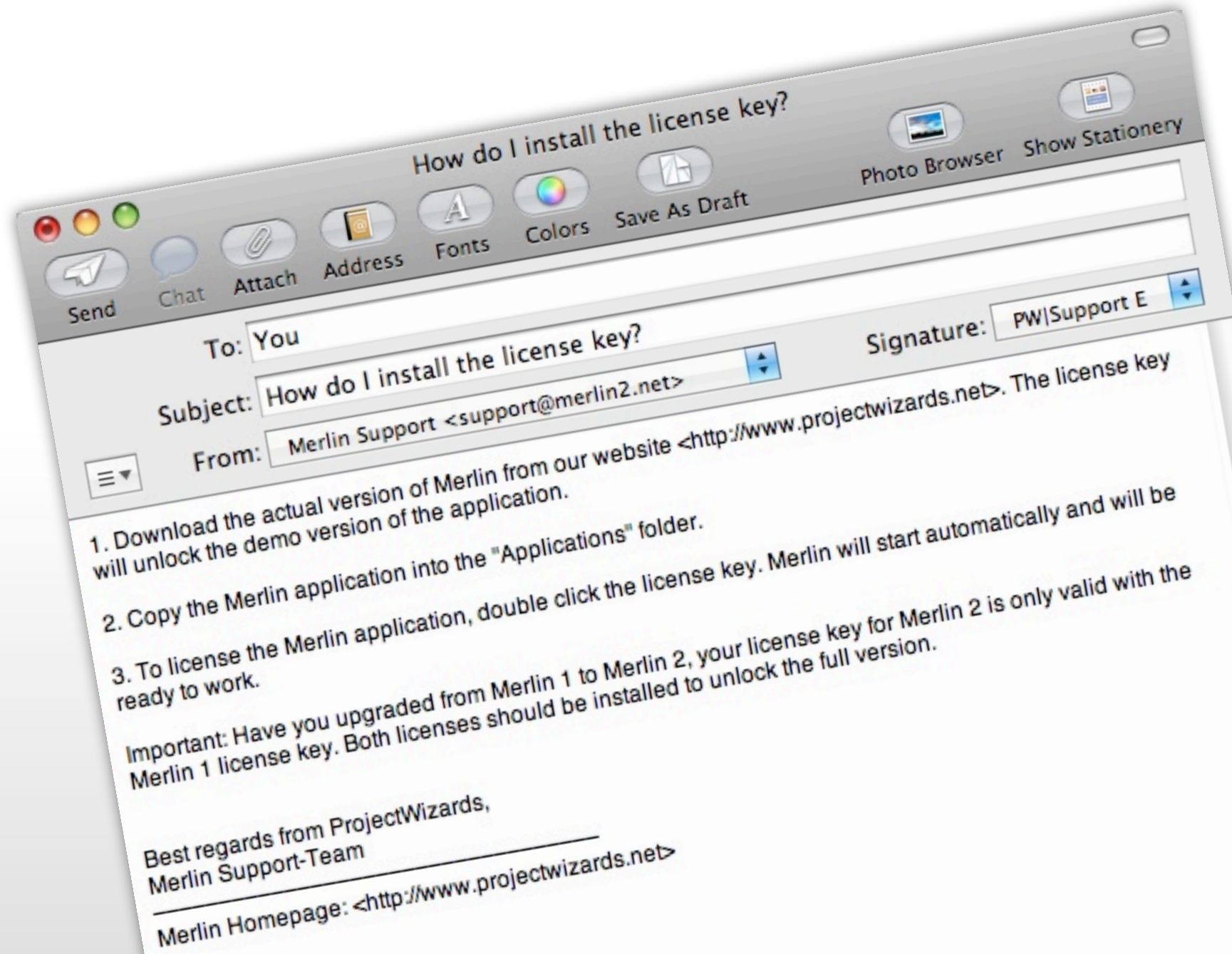


INSTALLING THE LICENSE



**Contact our support team
directly:**

en-support@merlin2.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 suppresses the welcome screen if the Lion setting “restore windows when quitting and re-opening apps” is enabled

MERLIN 2 - THE MAIN WINDOW

The screenshot shows the MERLIN 2 main window with several key components highlighted by orange boxes and lines pointing to descriptive text:

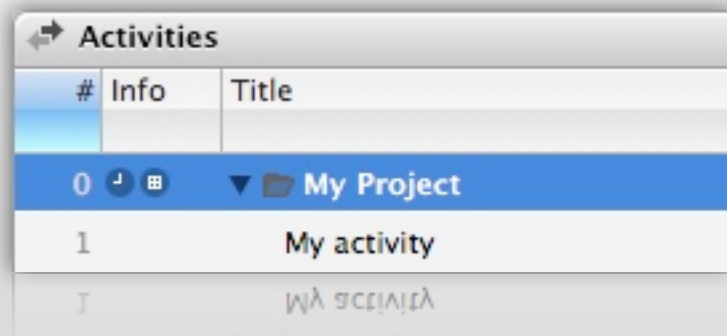
- Views:** A tab bar at the top contains 'Activities', 'Net Plan', 'Resources', and 'Utilization'. An annotation points to this bar with the text: 'Select a view from the main content area'.
- Icons:** A toolbar on the top right contains icons for a megaphone, folder, book, paperclip, and help. An annotation points to this toolbar with the text: 'For frequently used functions'.
- Main content area:** The central workspace is divided into two panes. The left pane is labeled 'Outline' and contains a table with columns for activity information. The right pane is labeled 'Gantt Chart' and displays a timeline grid for weeks 46 and 47 of November 2008. An annotation points to the entire main content area with the text: 'This is where you work on your projects!'.
- The Inspector:** A panel on the right side, titled 'Project: Plan Inspector', contains various settings for the selected project item, such as Title, Direction, Start/End dates, Limits, Expected completion, Status, Priority, Calendar, and Precedence. An annotation points to this panel with the text: 'Context sensitive control of all your project items'.
- Supplementary field:** Below the inspector is a 'Resources' section. An annotation points to this section with the text: 'For resources and planning conflicts'.
- Configure the main content area:** At the bottom of the main content area is a toolbar with icons for zooming and other navigation functions. An annotation points to this toolbar with the text: 'Organize, enlarge, reduce and overview'.

THE INSPECTOR

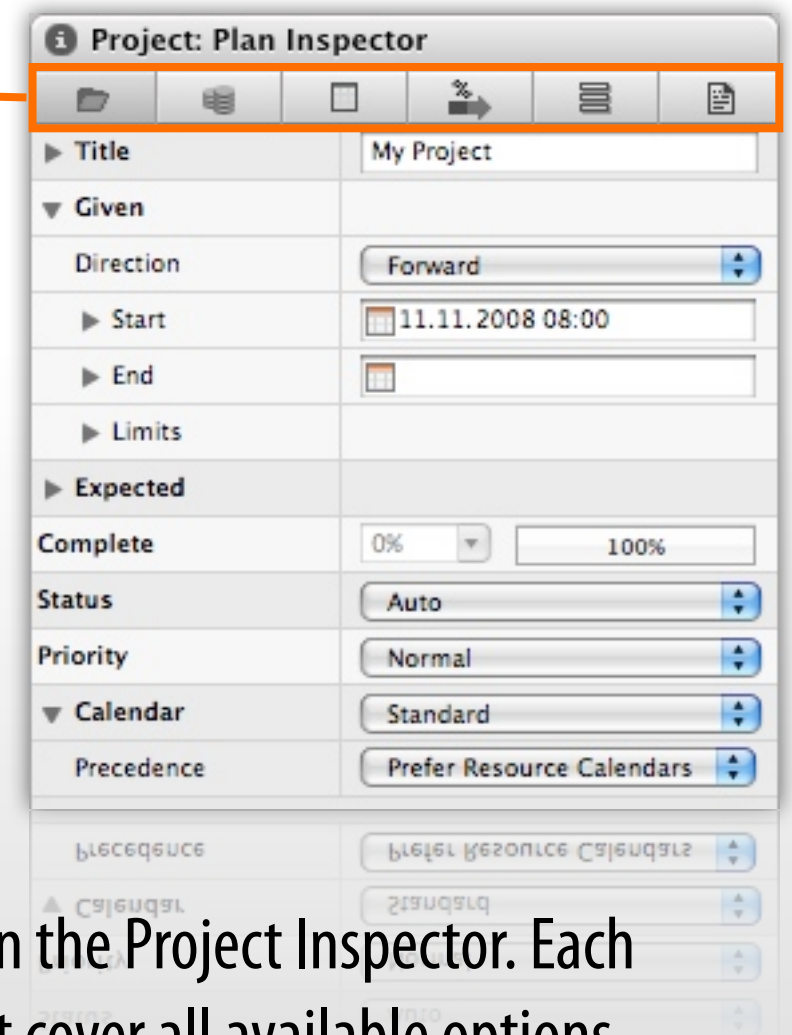
The Inspector lets you take control of all kinds of objects used in Merlin.

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

- ▶ Projects
- ▶ Activities
- ▶ Resources
- ▶ Elements
- ▶ Dependencies



Tabs



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.

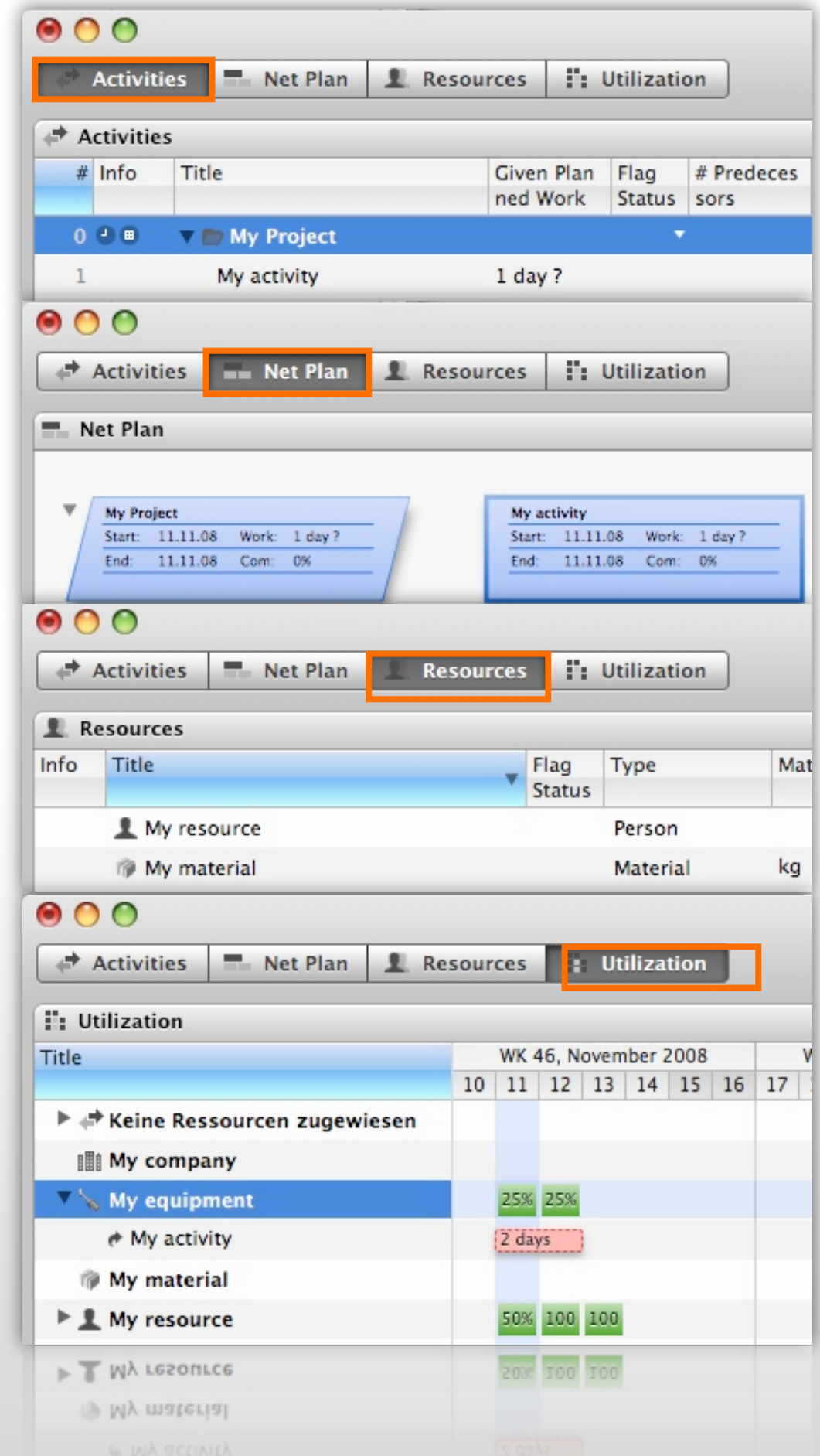
VIEWS

Merlin offers four project views:

- ▶ **Activities**
- ▶ **Net plan**
- ▶ **Resources**
- ▶ **Utilization**

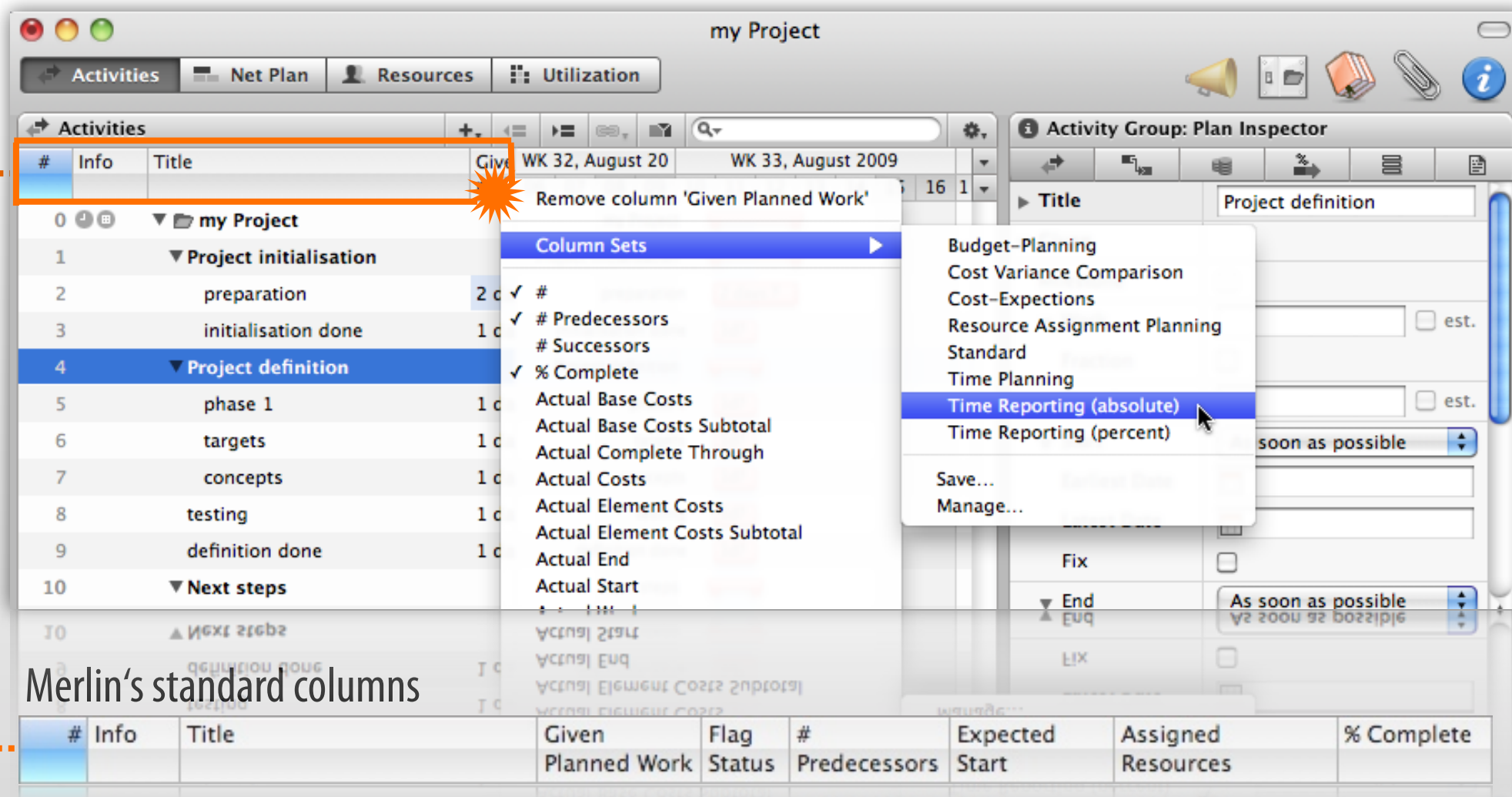
Simply click on the corresponding buttons to navigate between views.

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



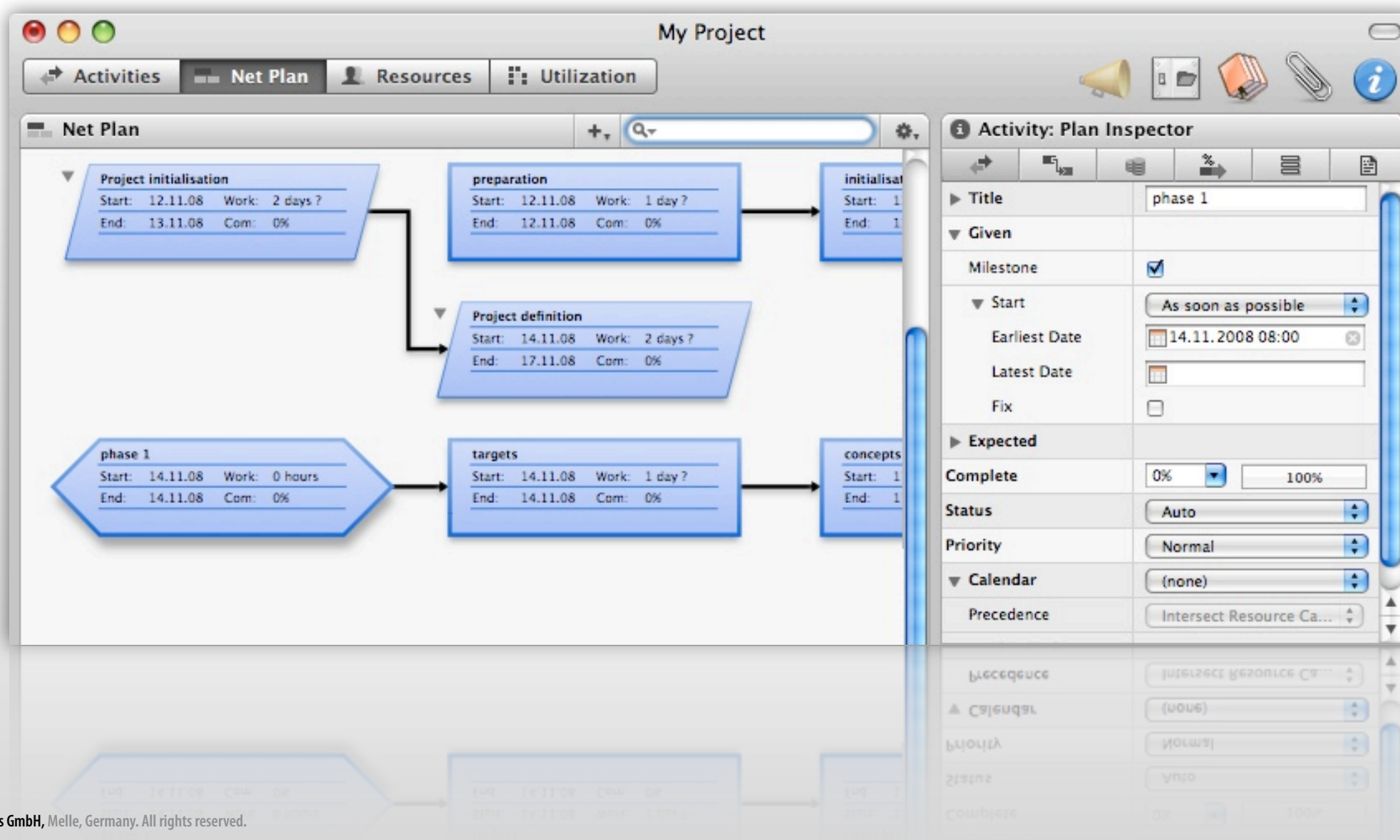
ACTIVITIES

The **Activities** view is generally the most often used as you plan the majority of your projects. To accomplish this, activities and allotments 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 ctrl (or 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.

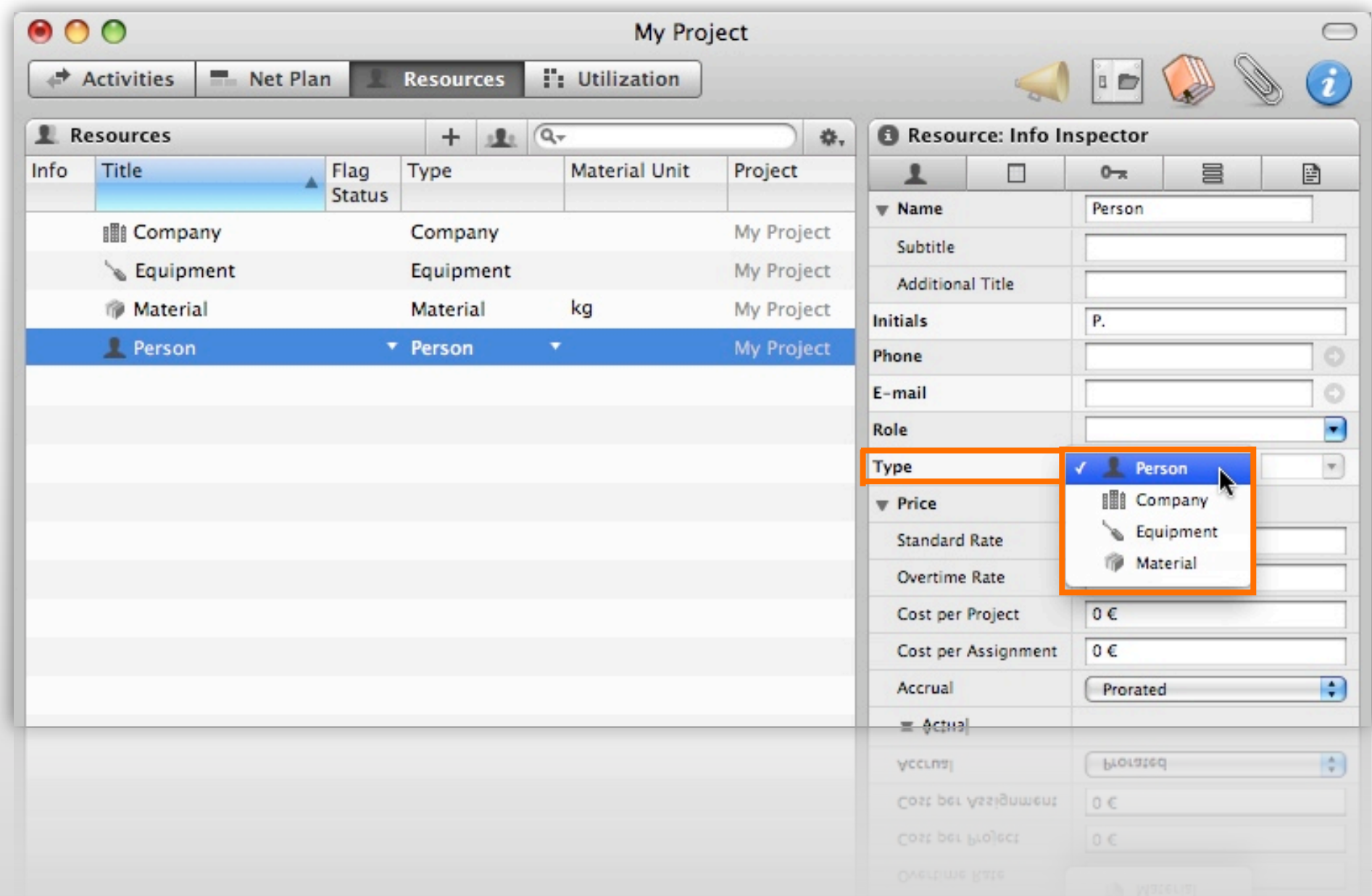


RESOURCES

The **Resources** view helps you manage all resources available and assigned to the project.

A resource may consist of one of the following types:

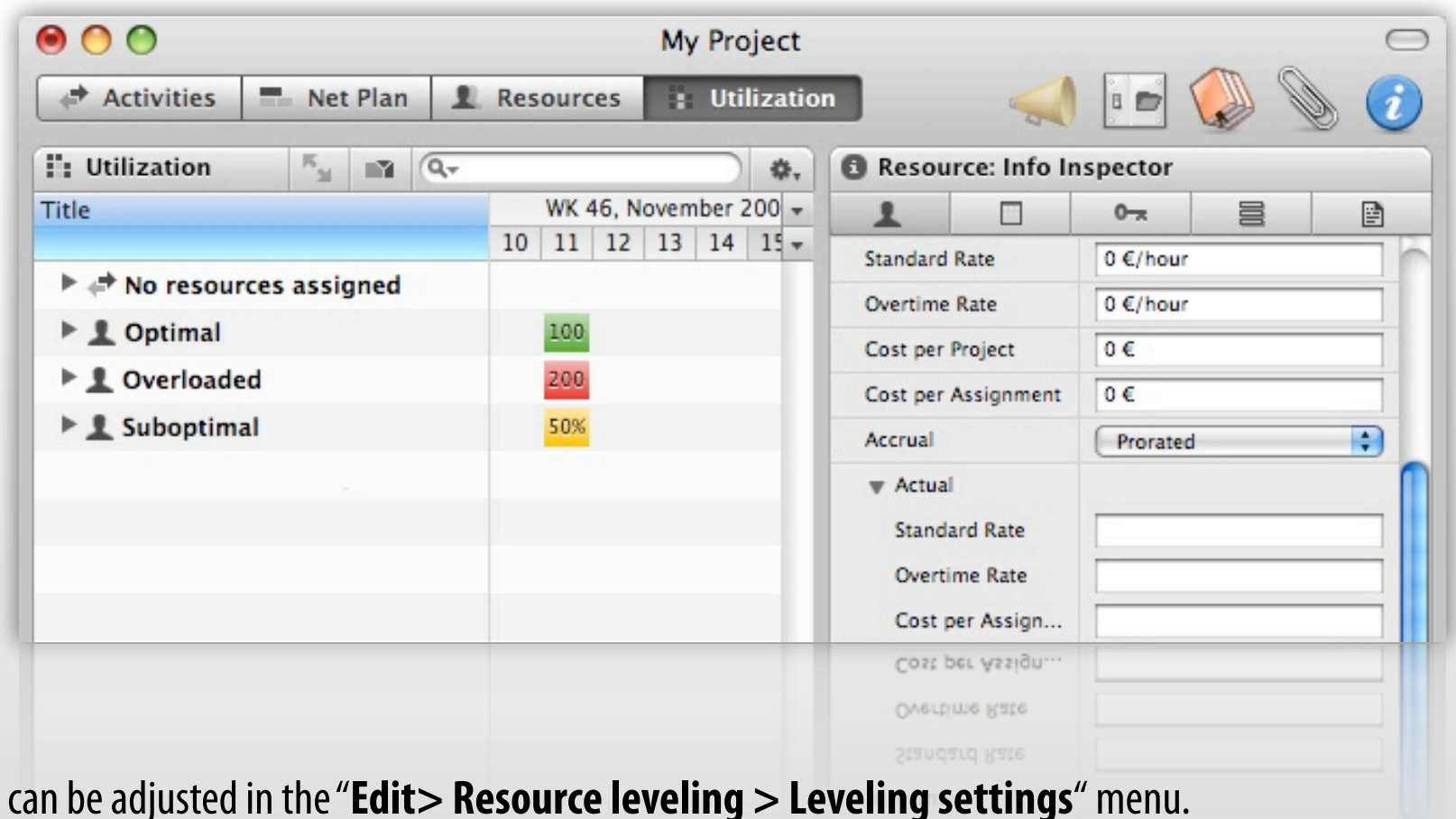
- ▶ **Person**
- ▶ **Material**
- ▶ **Company**
- ▶ **Equipment**



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!

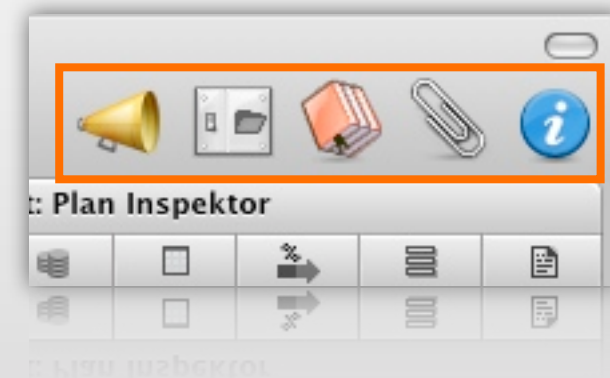


*Utilization requirements for overloading and derating can be adjusted in the “**Edit > Resource leveling > Leveling settings**” menu.

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:

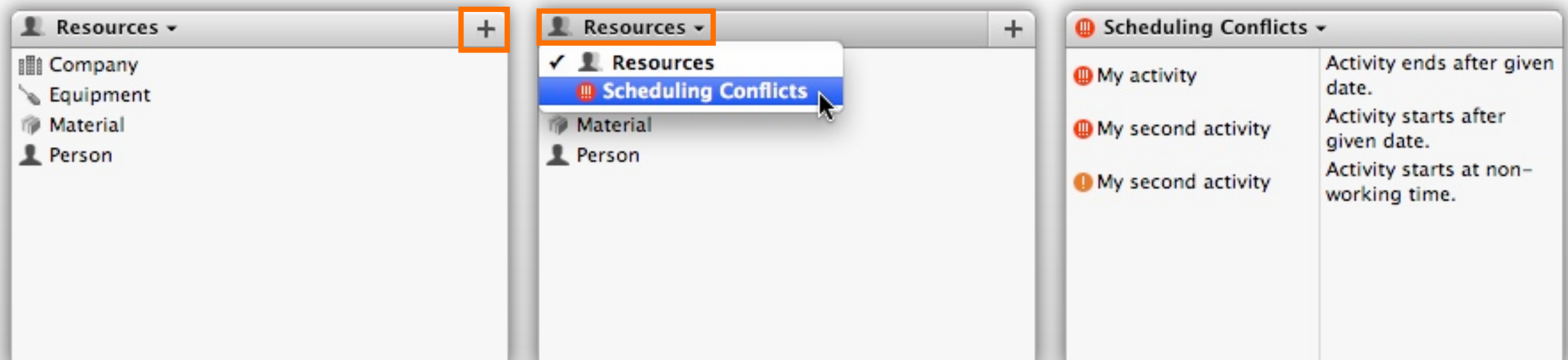
- ▶ **Publishing:** Retrieves the dialog for publications. [Command - Shift - P]
- ▶ **Settings:** Retrieves the dialog for all project settings. [Command - Shift - ,]
- ▶ **Library:** Toggles the display of the library window. [F3]
- ▶ **Elements:** Toggles the display of the field “elements”. [F2]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



THE SUPPLEMENTARY FIELD

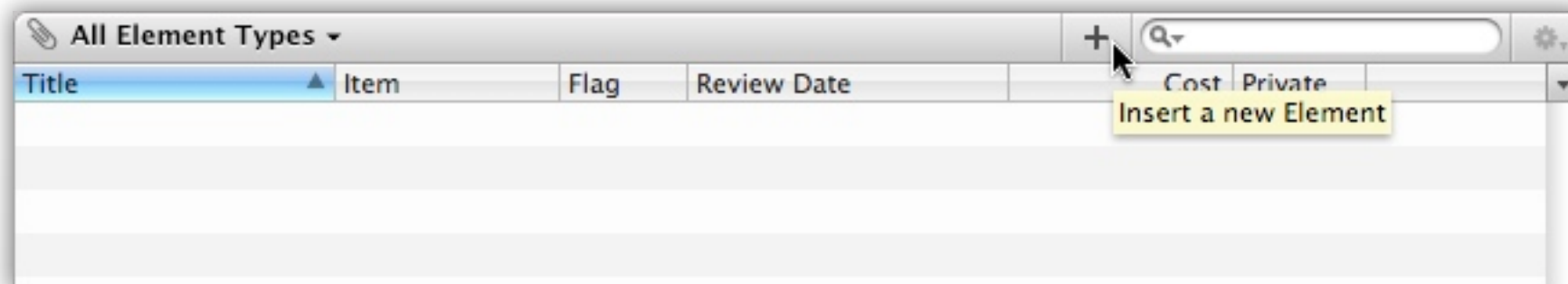
The supplementary field is divided into two areas, which can be modified by clicking on the title bar:

- ▶ **Resources:** All resources involved in the project are listed. Simply click the plus button to add a new resource. 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.

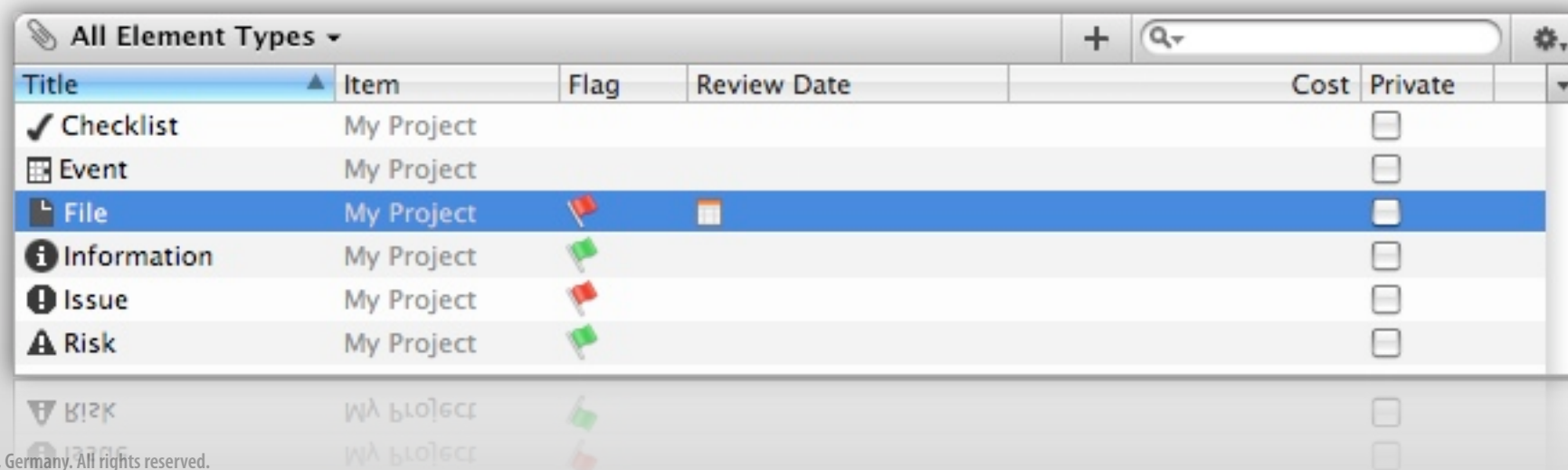


THE ELEMENTS

The **Elements** area is where you allocate your information during or after a project. Although not displayed by default, the area can be viewed by clicking on the staple icon in the right part of the toolbar, by pressing F2, or by selecting the **Window > Show Elements** menu option. Elements can be attached to activities, milestones, entire projects or resources.



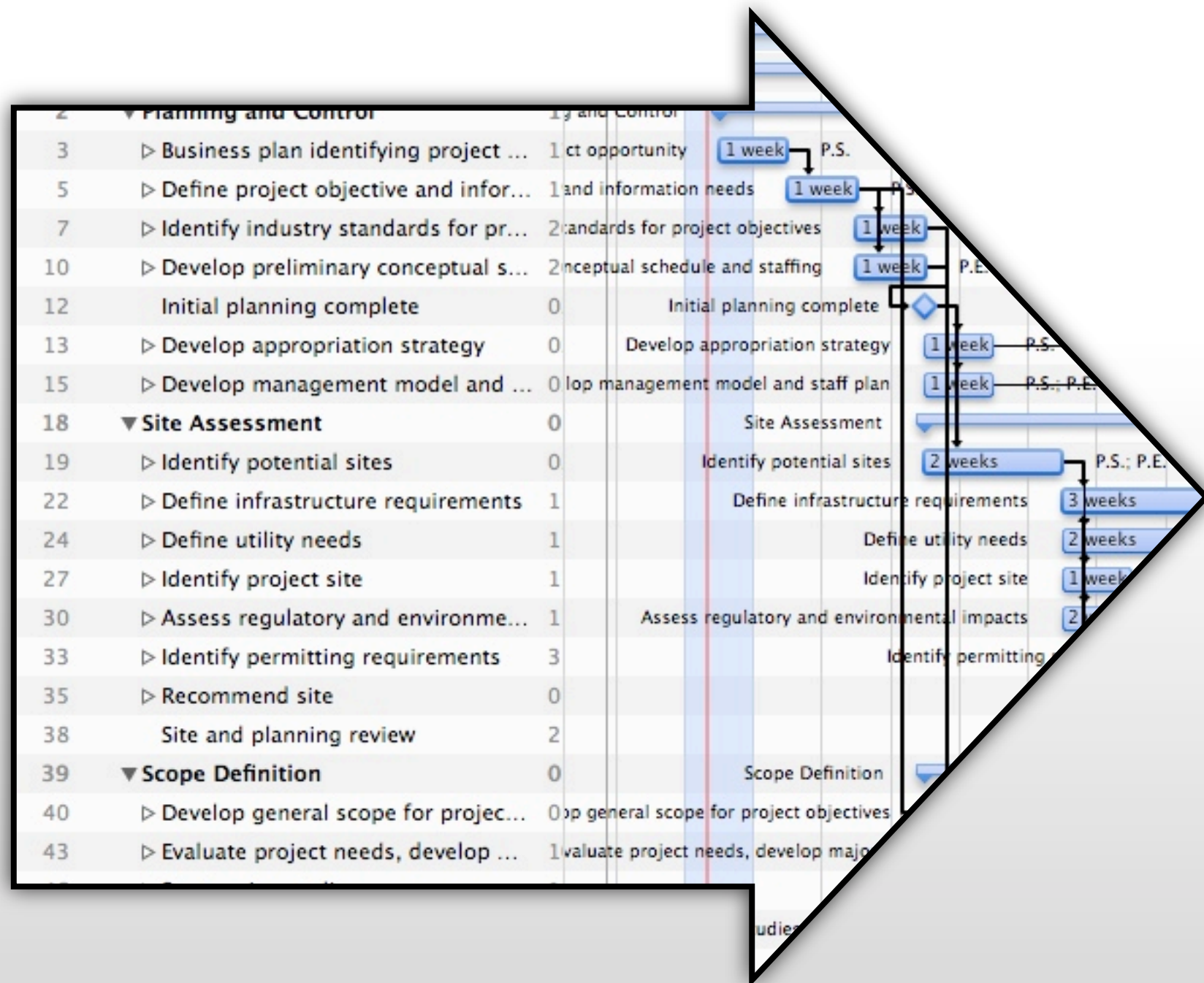
Highlight an activity/resource/project to associate a new element with it. You may choose from the following six element types:



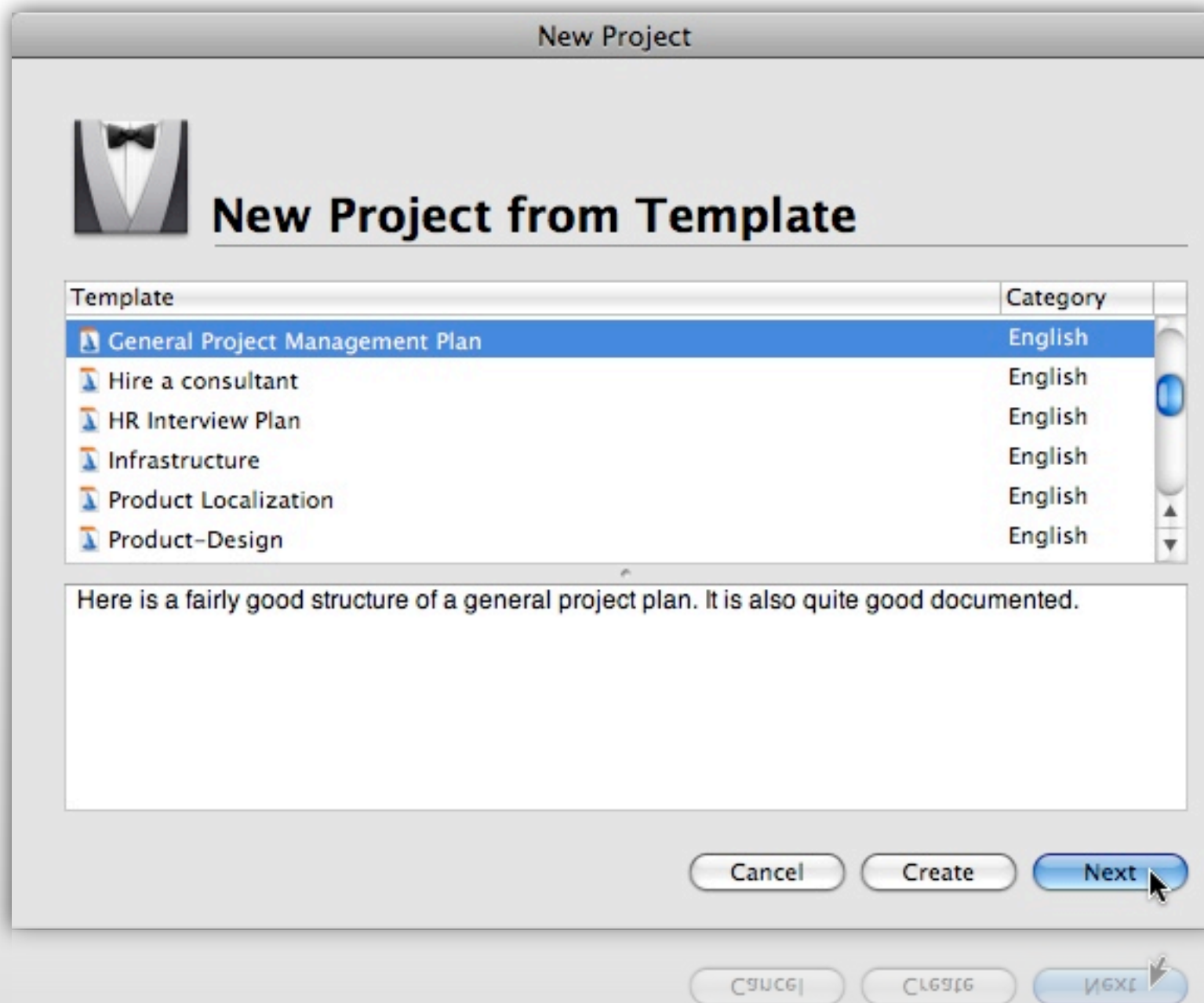
MERLIN'S WORKFLOW

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



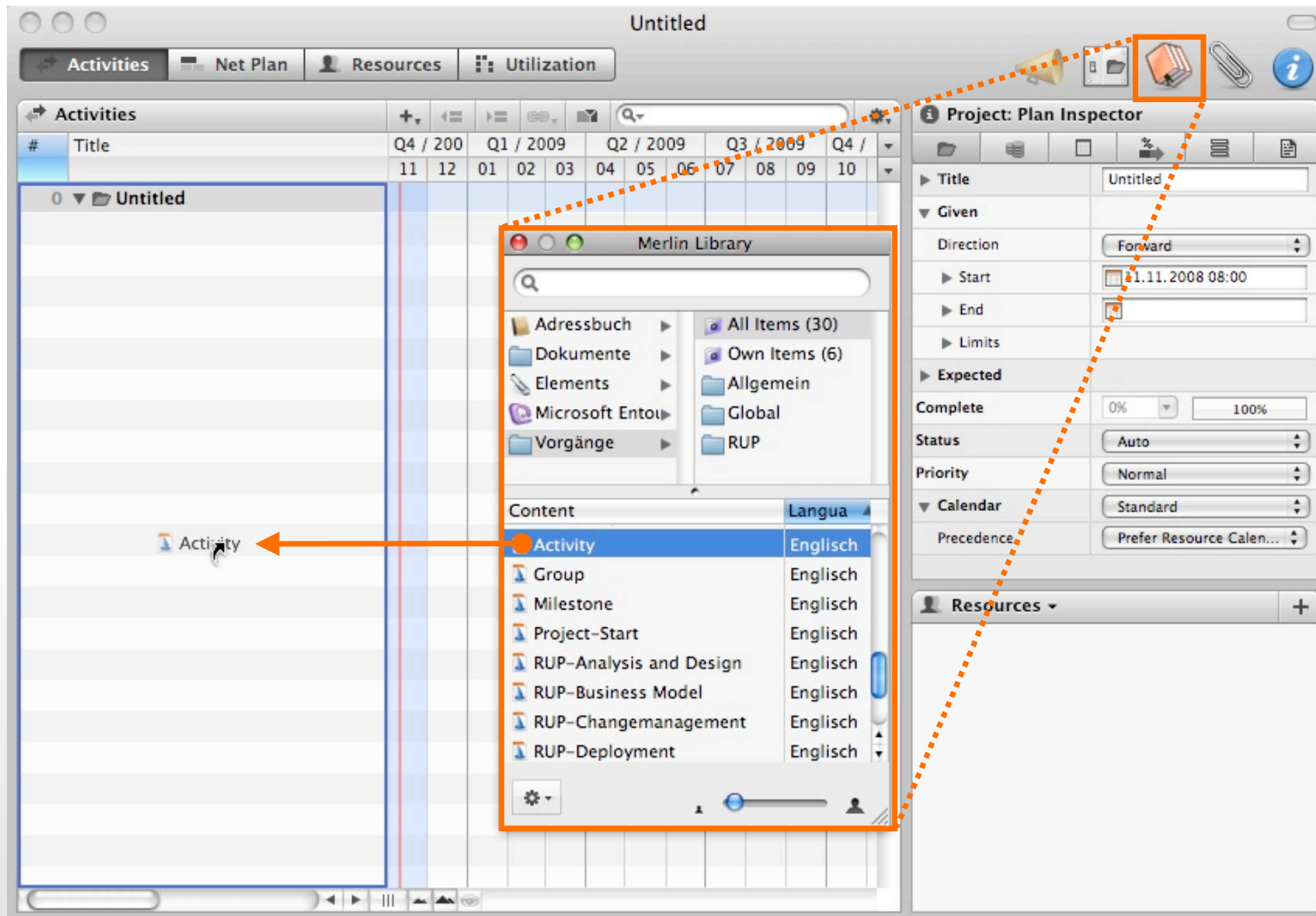
A NEW PROJECT



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

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

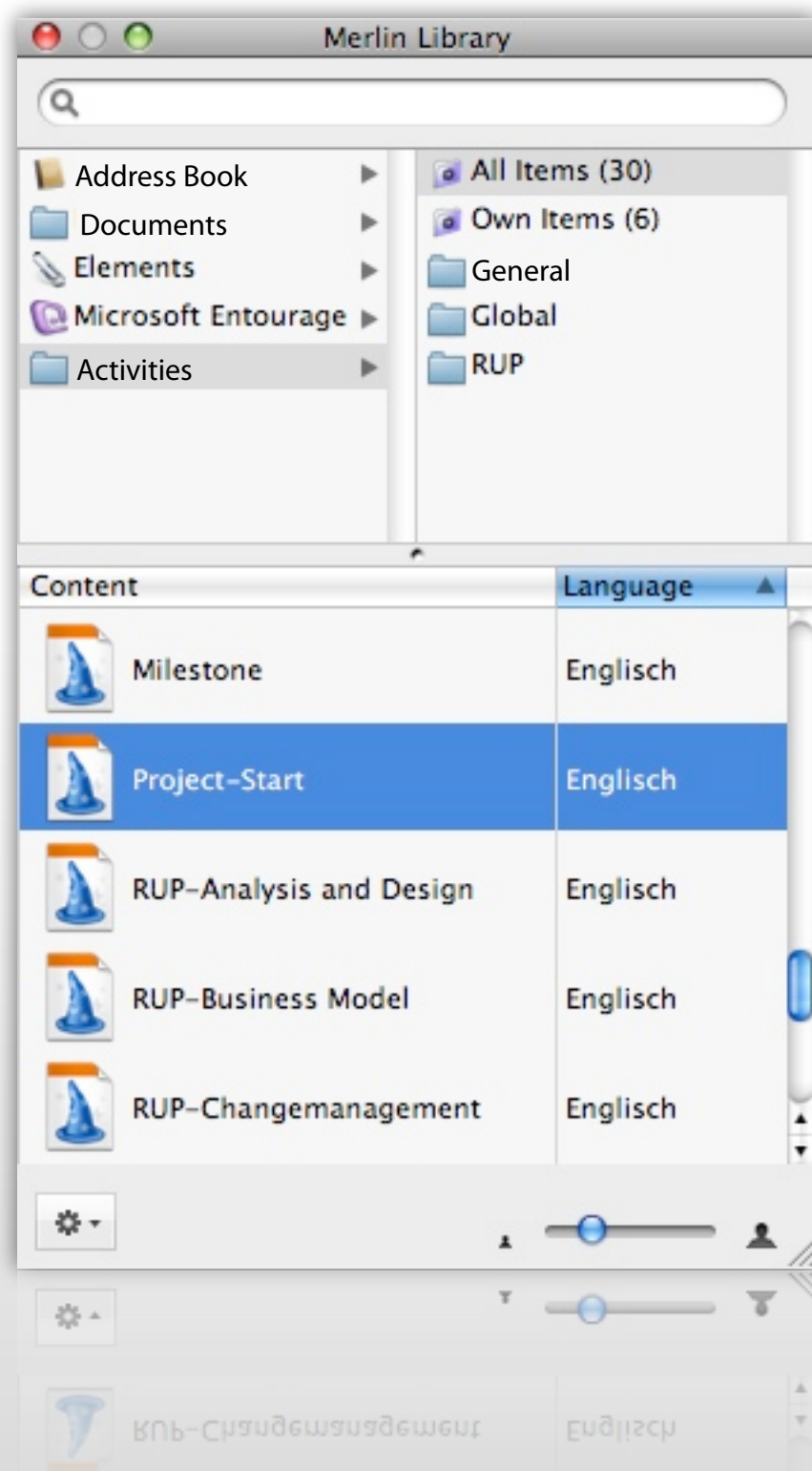
FROM ZERO TO SIXTY IN ONE STEP...



Select **File > New Empty Project** 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.

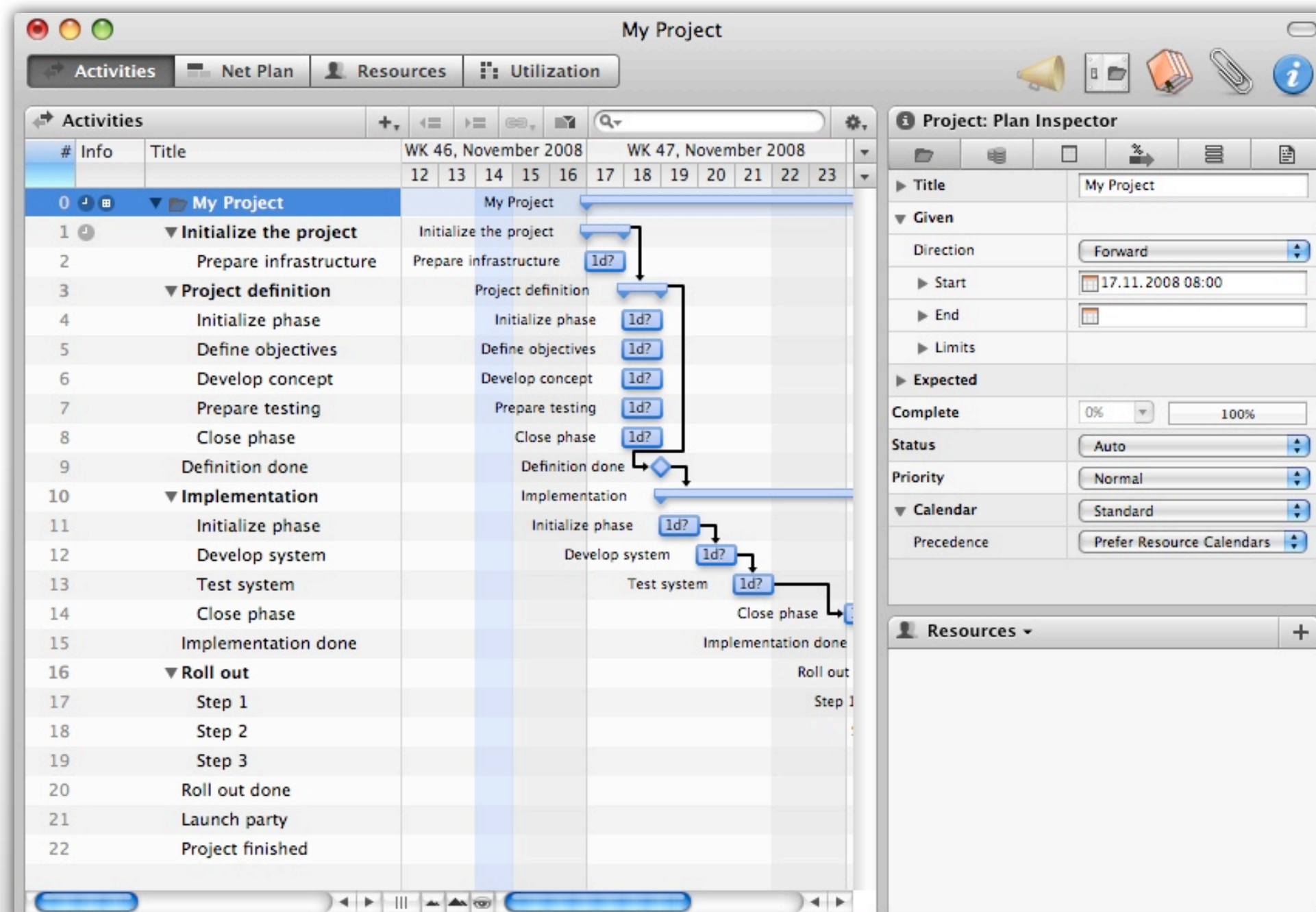
The library contains preset activities and groups of activities that simplify and speed up the creation of a project.

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

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

For further information on the library, [click here](#).

PRELIMINARY RESULT



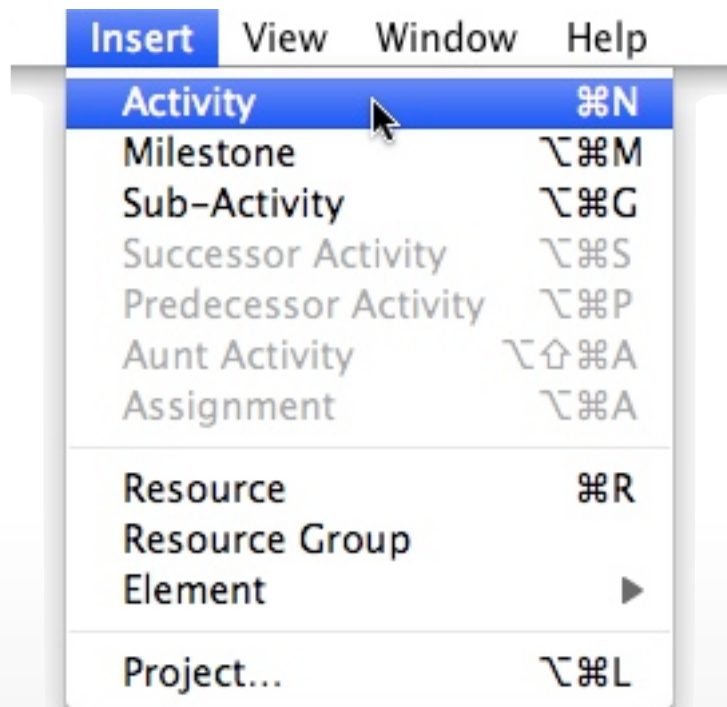
Once the activities have been transferred from the library, the blue background in the outline indicates the last modification made in the project.

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

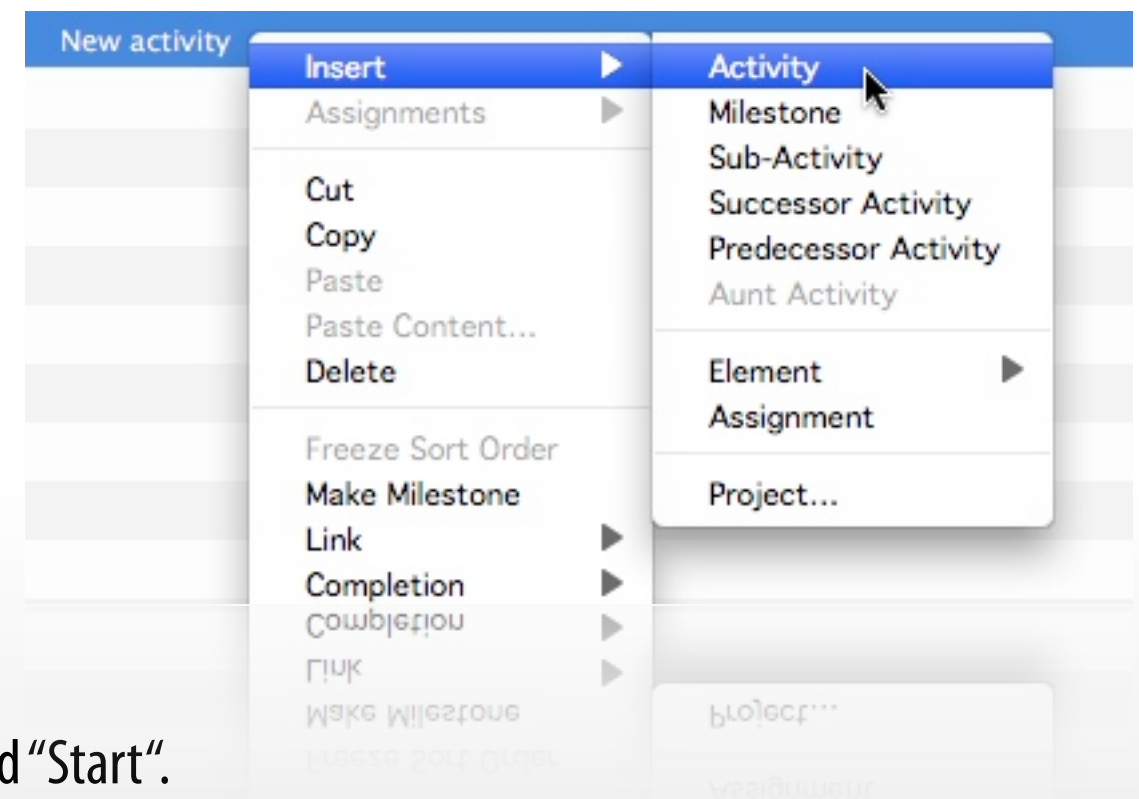
Next, we will create new activities...

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
0	My Project	My Project						
1		Start		Start				

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

LINKING ACTIVITIES

Four different types of dependencies can be established when linking activities. The one most commonly used is **finish - start**.

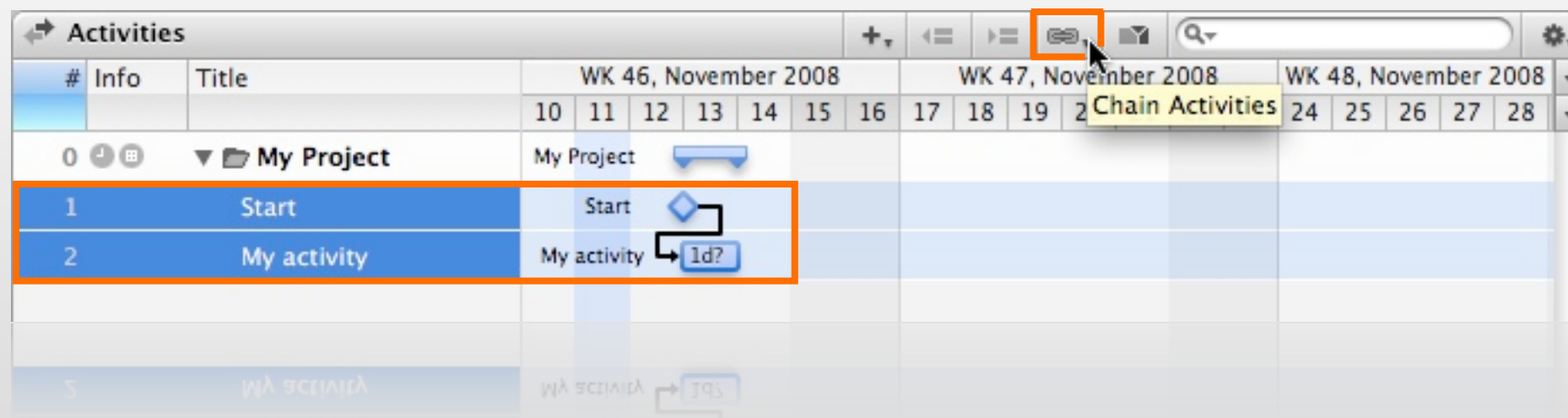
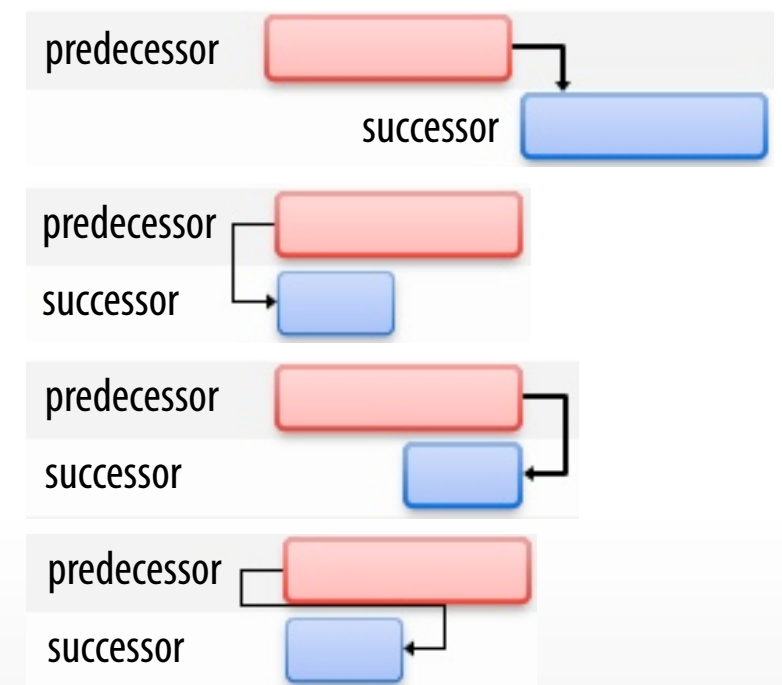
In order to create a new link in Merlin, you need to select two (or more) activities and click on the **Chain Activities** icon. The activities will then be linked using **finish - start**. This can also be done by selecting **Edit > Link activities** from the menu or with the [Ctrl - Command - L] keyboard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

finish - start

start - start

finish - finish

start - finish



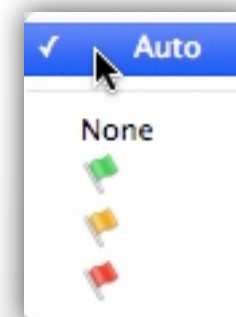
More information on [this topic...](#)

STATUS OF THE FLAGS

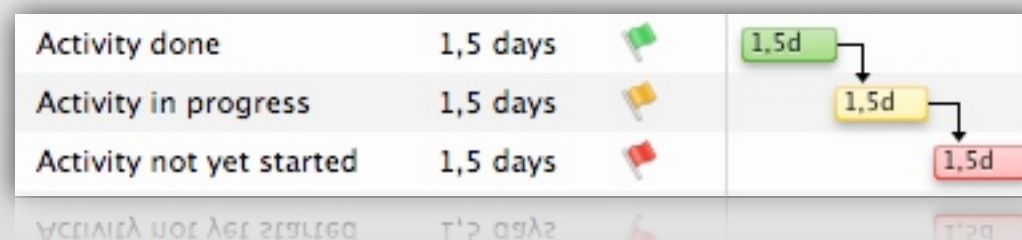
The color status of the flags indicates the status of activities. It is usually calculated automatically but can also be manually set by the user.

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.



ASSIGNING RESOURCES

The screenshot displays the 'General Project Management Plan' application. The main window is divided into several panes. On the left, the 'Activities' pane shows a hierarchical list of project tasks, including 'Initiating', 'Project Initiation', 'Define Scope', and 'Planning'. The 'Project Manager' resource is highlighted in the 'Resources' pane on the right. An orange arrow points from the 'Project Manager' resource to the 'New activity' task in the 'Activities' pane, indicating the process of assigning resources to tasks. The 'Project: Plan Inspector' pane on the right provides details for the selected activity, such as its title, direction, start and end dates, and completion status. The 'Resources' pane at the bottom right lists various roles like 'Acceptor', 'Application Architect', 'Contracts Manager', 'Project Director', 'Project Manager', 'Quality Assurance', 'Team Leader', and 'Technical Architect'.

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.

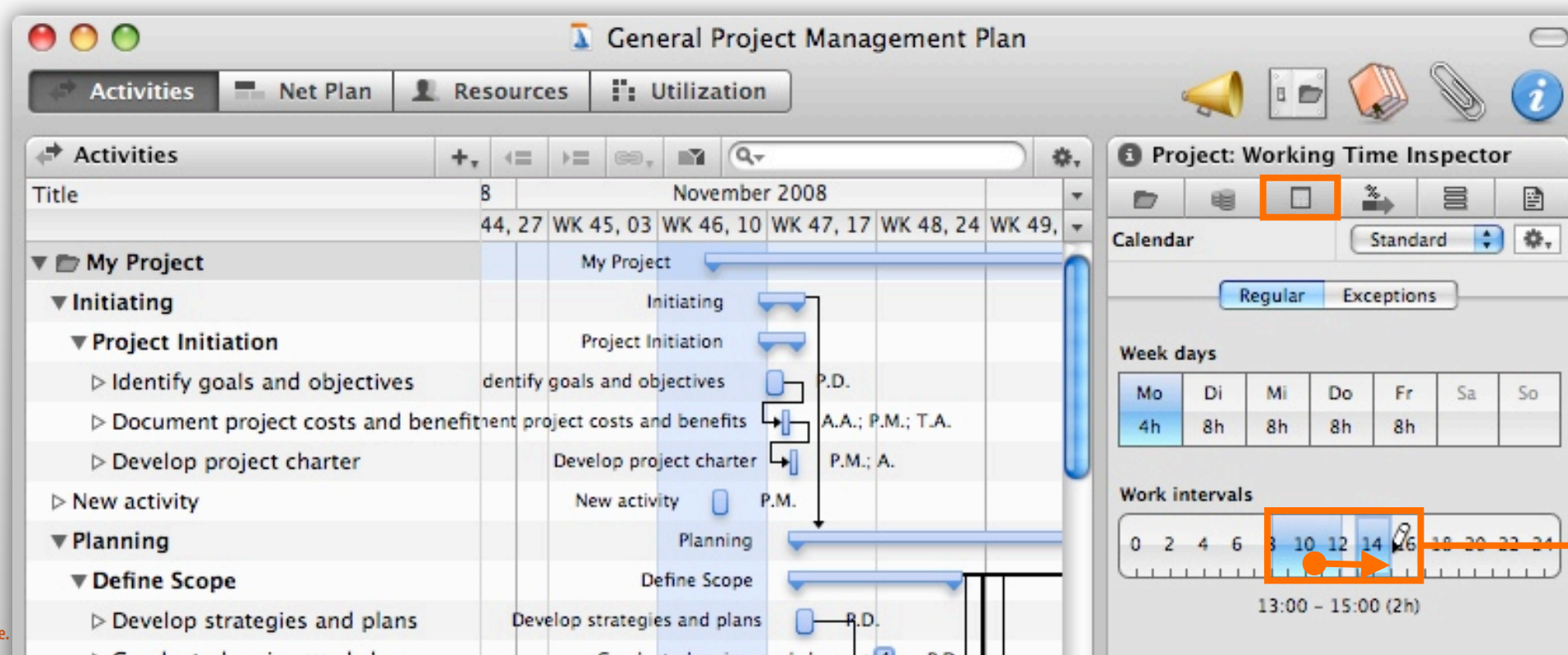
The next logical step involves resources' assignment.

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

WORK TIME PERIOD

With the **Working Time Inspector** 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 defined in the **Regular** field under the **Week days** 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.



Hint: Press the Alt key as well in order to create $\frac{1}{4}$ 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 'General Project Management Plan' application. The main window shows a Gantt chart for 'My Project' with activities like 'Initiating' and 'Project Initiation'. A specific activity, 'Identify goals and objectives', is highlighted with an orange box. To the right, the 'Activity: Actuals Inspector' panel is open, showing fields for 'Actual Start' (19.11.2008), 'Actual End', 'Actual Progress' (Perce), and 'Results'. The 'Actuals' tab is selected, and the 'Actual Start' field is highlighted with an orange box.

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, delays and waiting periods caused by certain activities are not 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.

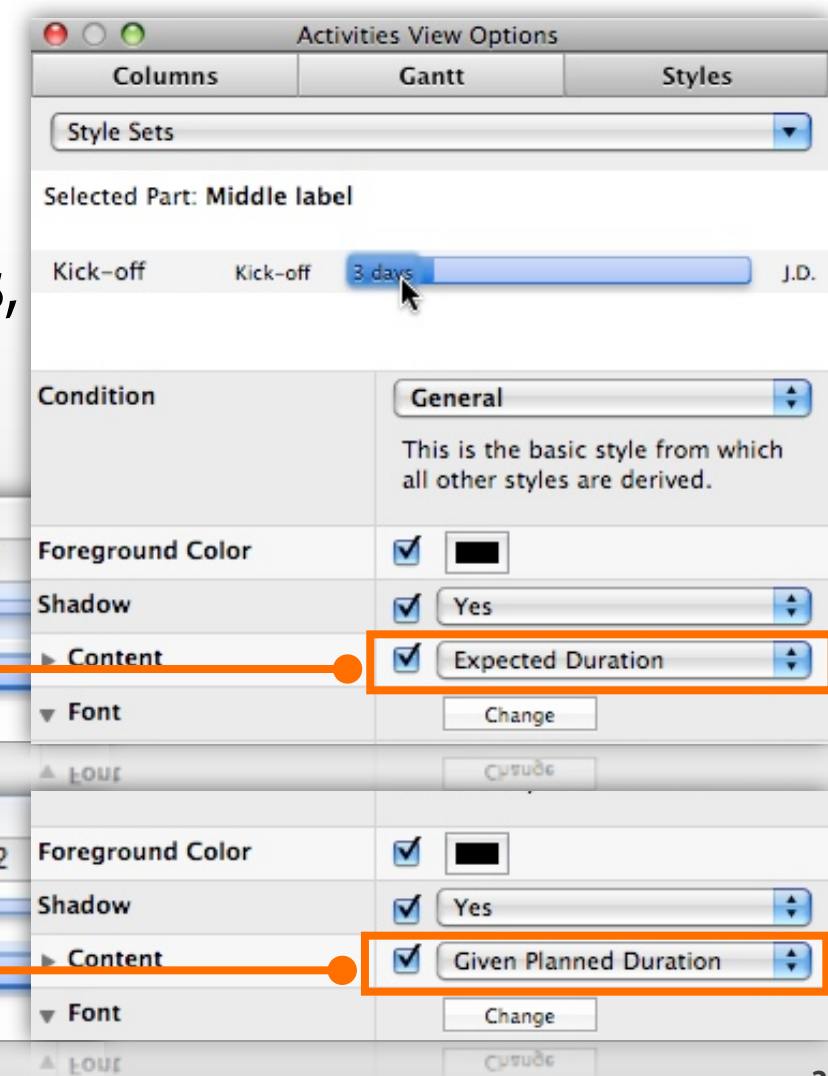
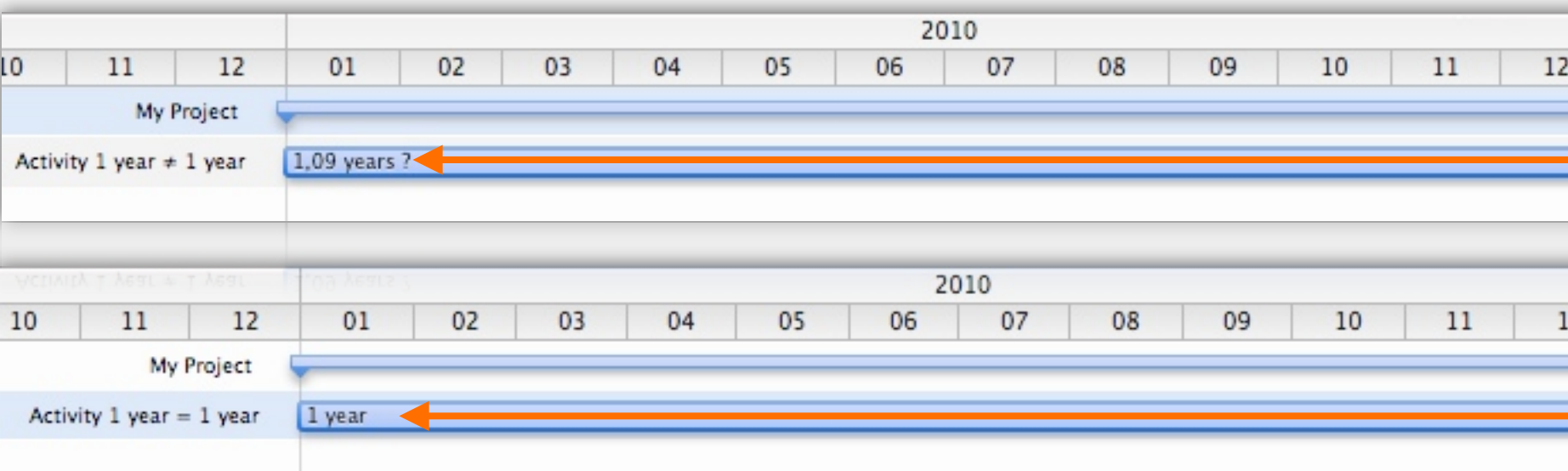
Activity: Plan Inspector	
Title	Design
Given	
Milestone	<input type="checkbox"/>
Work	1 day <input checked="" type="checkbox"/> est.
Duration	2 weeks <input checked="" type="checkbox"/> est.
Duration	5 weeks <input type="checkbox"/> est.
Work	1 day <input type="checkbox"/> est.

THE PLANNED DURATION

In the following example, the activity runs from January 1, 2009 at 8 am until January 1, 2010 at 8 am. The activity bar in the Gantt-chart says 1.09 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 1,09 working years.

Hint: Change the content for the middle label in View Options > **Styles**, from **Expected Duration** to **Given Planned Duration**



PROJECT SETTINGS

To see and modify settings that concern your project, go to **File > Project Settings**. Project settings are saved directly into the project file. They 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:

Default Overtime Rate:

Work Units

Hours per Man Day:

Hours per Man Week:

Days per Man Month:

Default Work:

Calculated Durations:

Date Presets

Dynamic Shifting:

Status Date:

First day of week:

Settings for My Project

General Value Lists Misc

Values

For:

▼ 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:

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 are 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 has a title bar 'Settings for My Project' and three tabs: 'General', 'Value Lists', and 'Misc'.

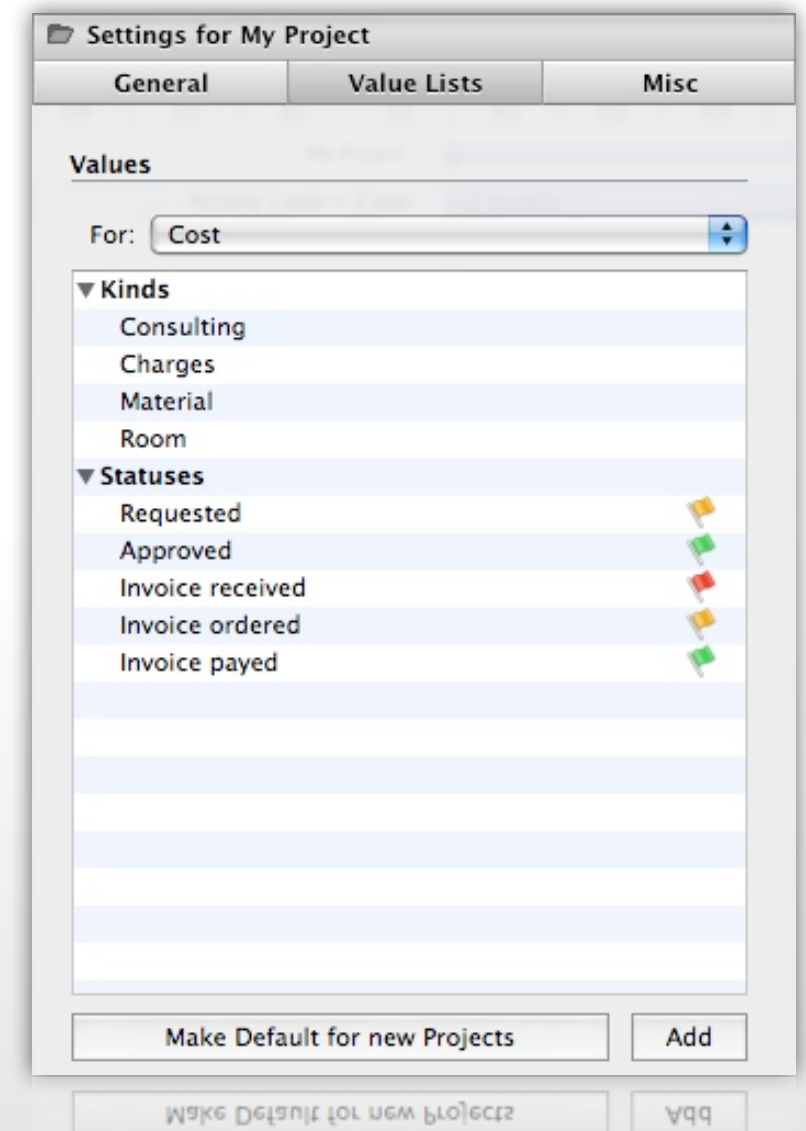
Category	Setting	Value
Financial	Currency Symbol	€
	Default Work Rate	0 €/hour
	Default Overtime Rate	0 €/hour
Work Units	Hours per Man Day	8
	Hours per Man Week	40
	Days per Man Month	20
	Default Work	1 day ?
	Calculated Durations	Dynamic
Date Presets	Dynamic Shifting	Off
	Status Date	
	First day of week	Monday

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 **Add** 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 their work

Security: To secure your project for anonymous users, add a check mark here

Project Image: Place the logo of the project, your company or the client here. It can be included in printouts and reports.

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.

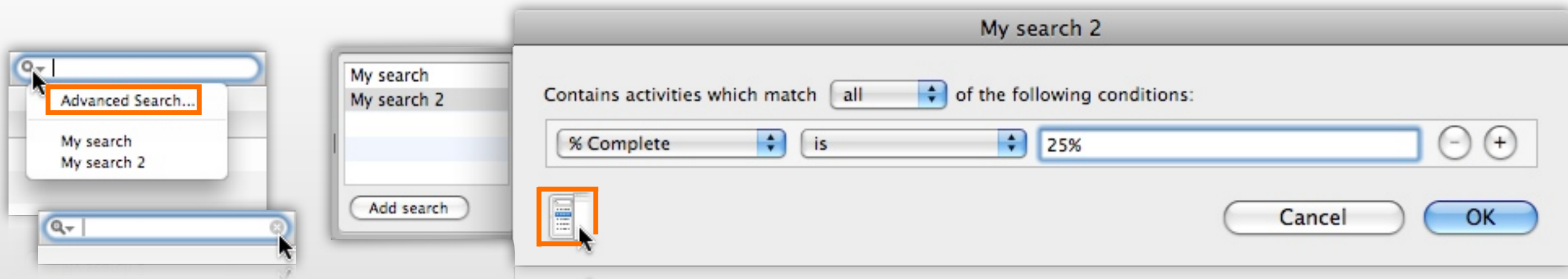
My Logo



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 zoom glass icon in the search box
- ▶ You can select various search criteria from the pop-up menu and add or remove them using the + or - buttons. Being able to include additional search conditions helps you conduct more precise searches when clicking **OK**.
- ▶ To cancel the extended search, just click on the small **x** symbol in the search field

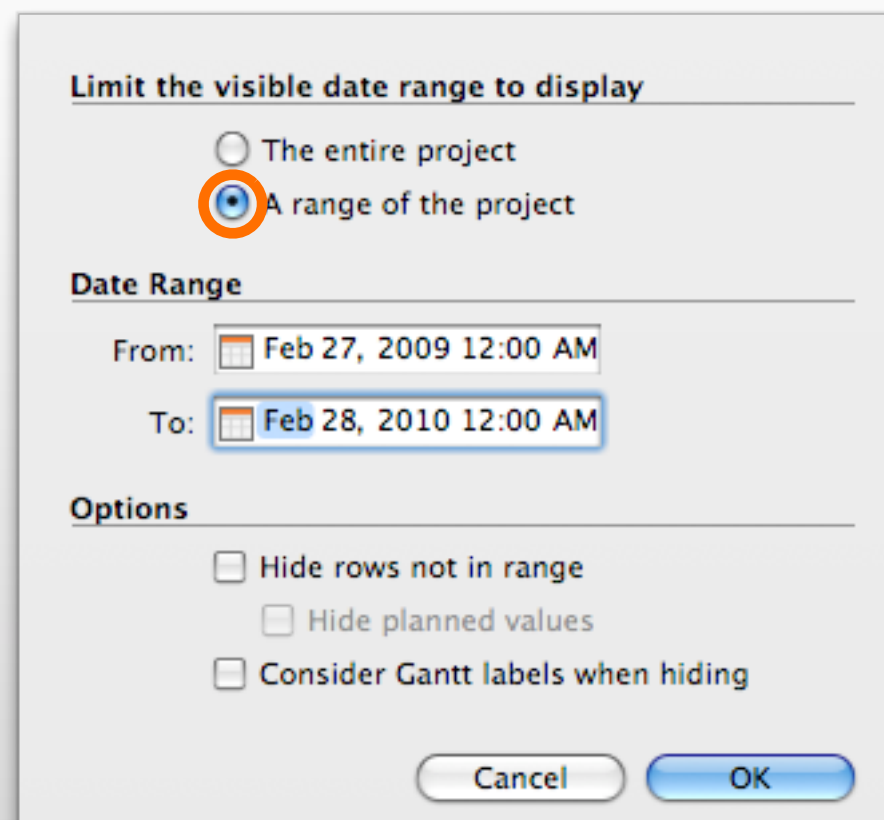
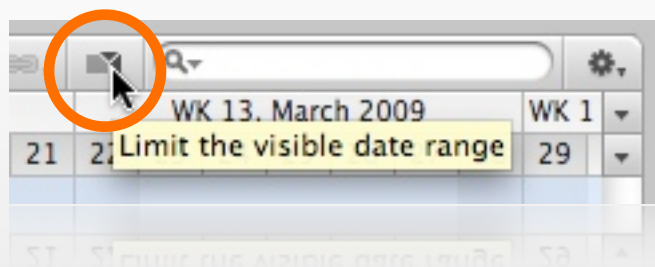


Extended searches can be named and saved for later use. To save your search, click on the drawer symbol and then on **Add search**.

LIMIT THE VISIBLE DATE RANGE

An extended search allows the definition of vertical constraints for 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.



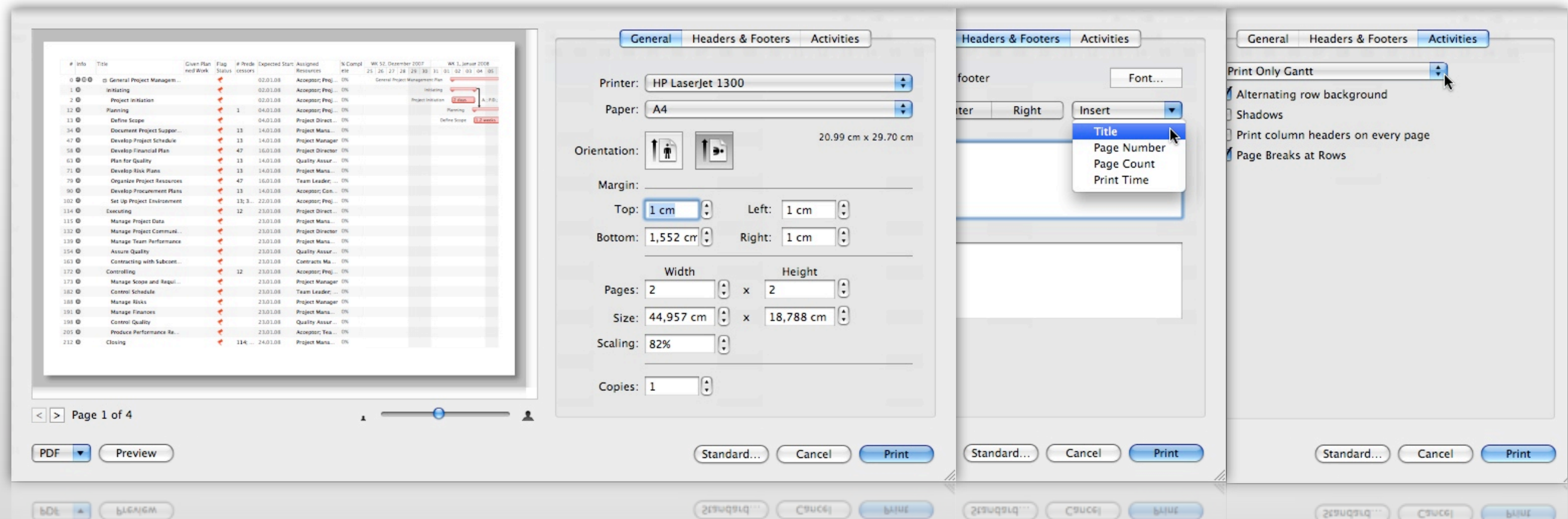
Hint: The button **Limit the visible date range** glows blue in a document where this option is enabled.

PRINTING

Merlin offers robust and flexible printing services. Simply go to **File > Print** or press the keyboard shortcut [Command - P] to start your print job.

Merlin's printing capabilities reproduce precisely 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!

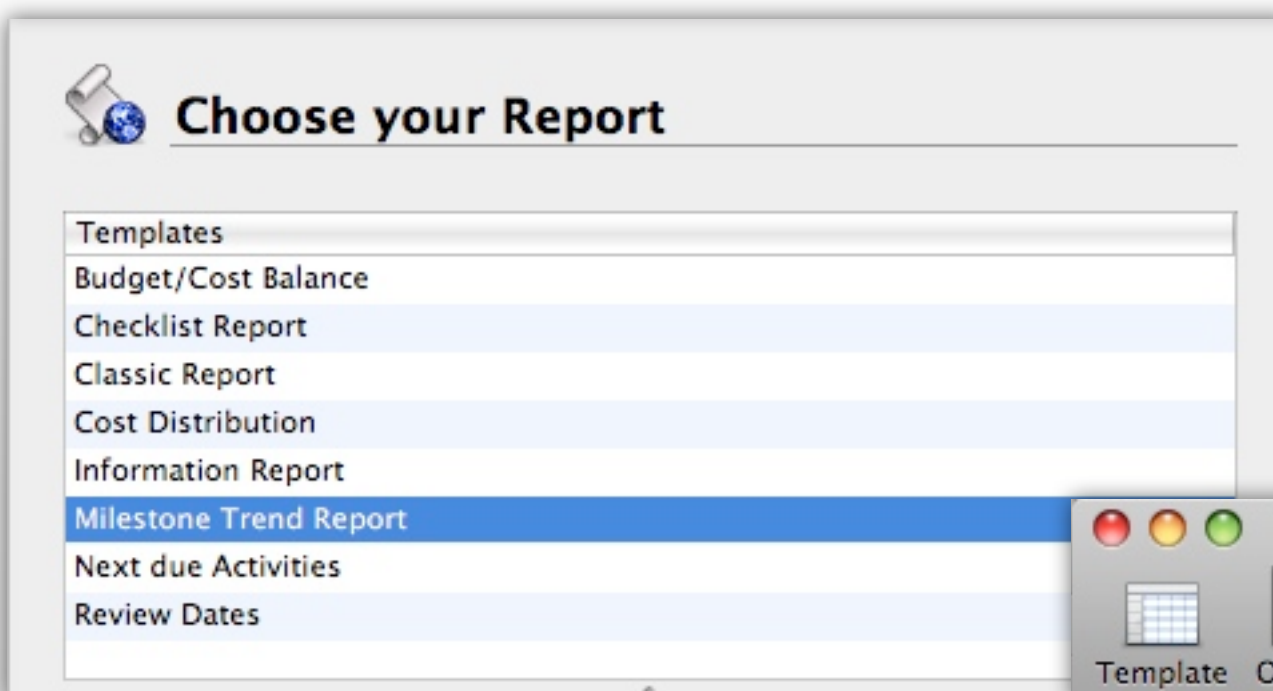
You can customize your print job, modify its size, add headers and footers, and limit output to the Gantt or outline display.



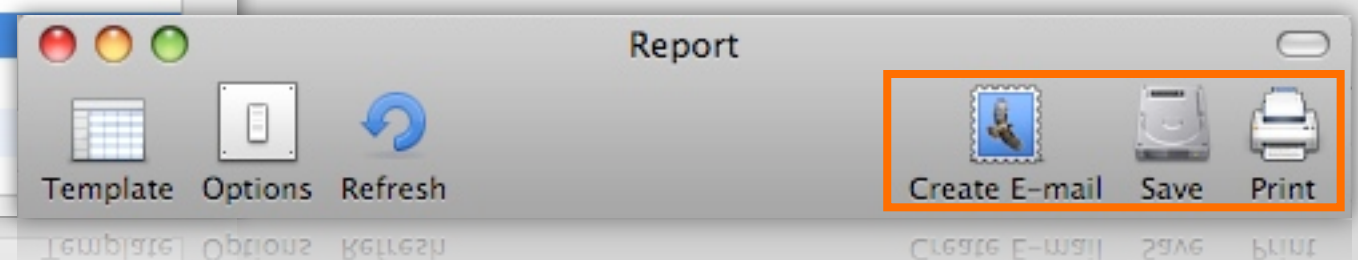
CREATING REPORTS

With the Merlin reporting system, you can use the provided report templates and output project data. Various options allow further customization. To create a report:

- ▶ Select **File > New Report** to access existing report templates.
- ▶ Then simply choose the desired report template.



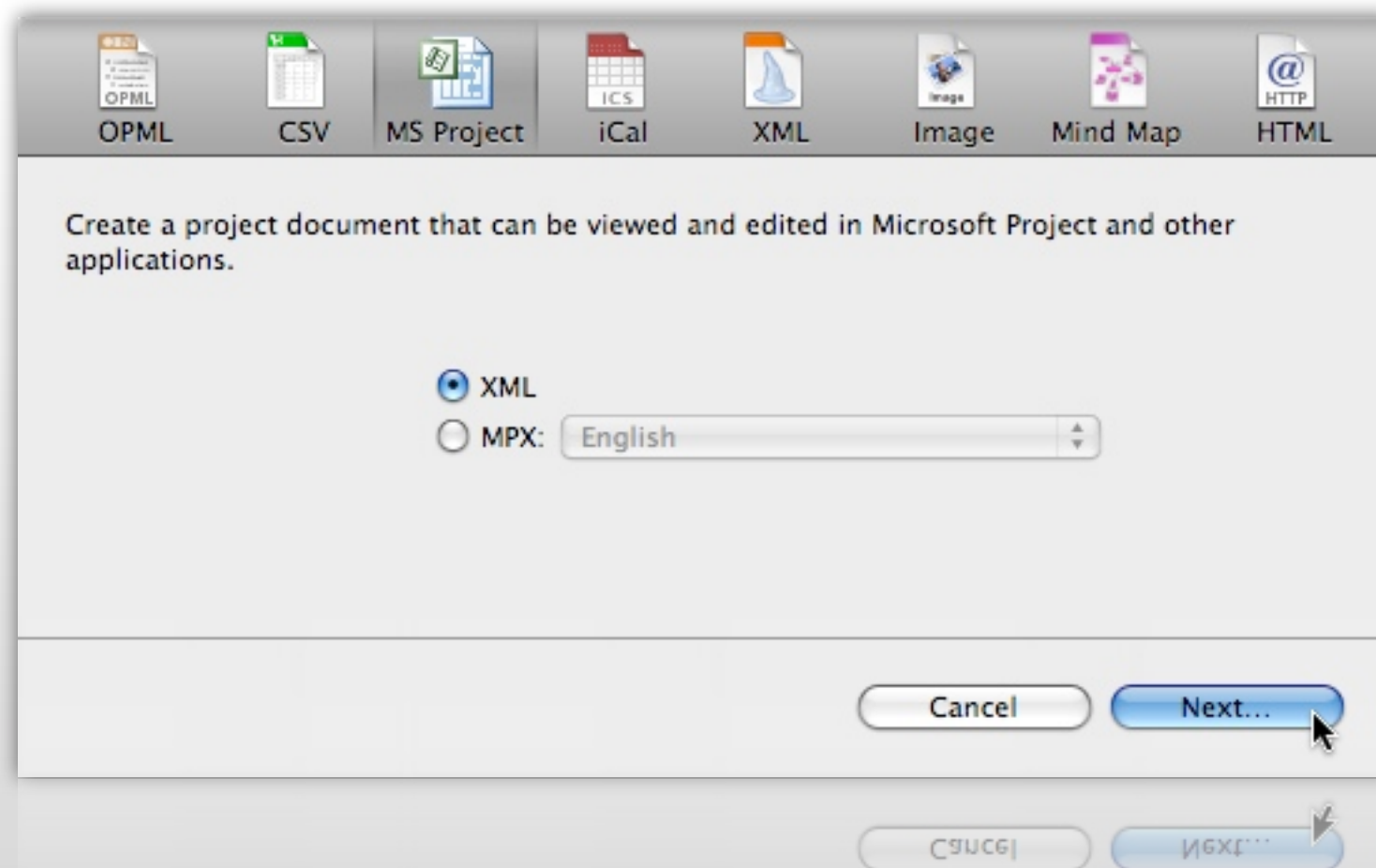
You can easily communicate project status with other team members. Just send a report via email, print it out or save in HTML format or as a PDF file.



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, go to **File > Open** or simply drag and drop the file over the Merlin application icon.
- **To export** different file formats, simply select **File > Export**.



***Our recommendation:**

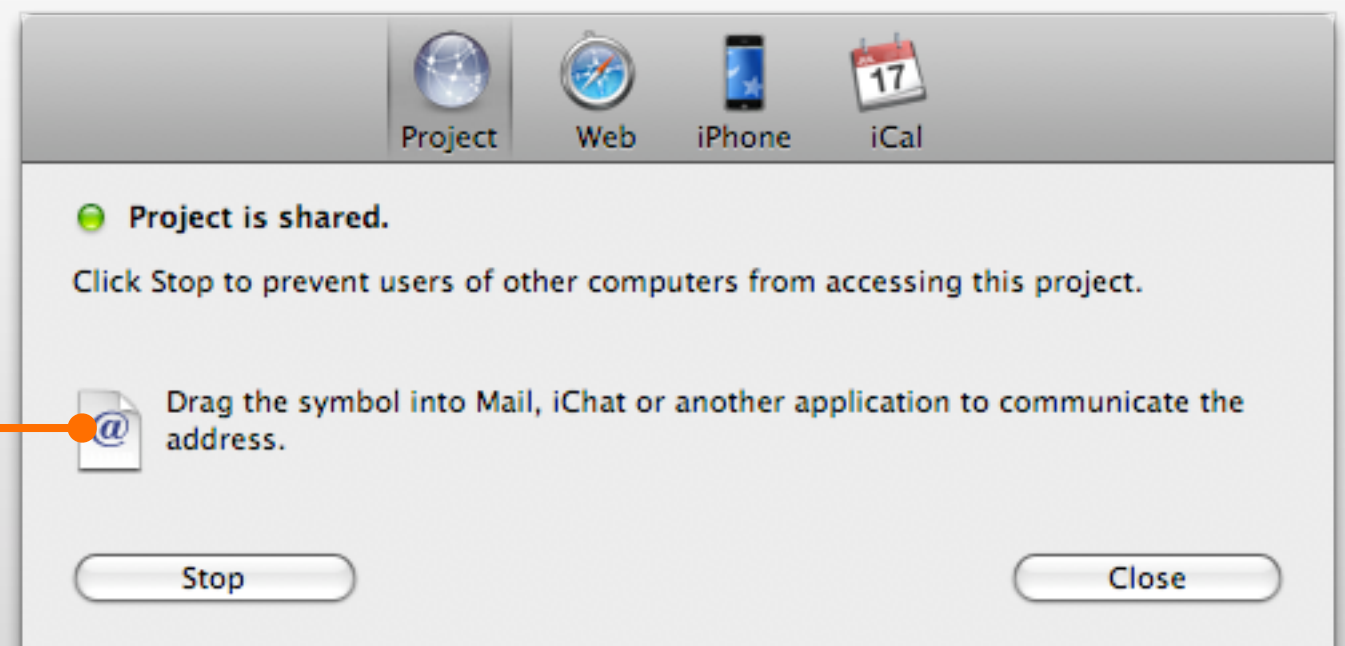
Use the XML format for best results when importing and exporting MS Project files.

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.

- Save your project prior to publishing; otherwise the **Publish** function is not available.
- Use the proxy icon* with the IP address of your computer and forward it to project stakeholders. Your project may be accessed within the local network or over the internet.
- To allow access over 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.



PUBLISH PROJECT FOR MERLIN USERS

To share the current project for concurrent use by other Merlin users, go to **File > Publish > Project**.

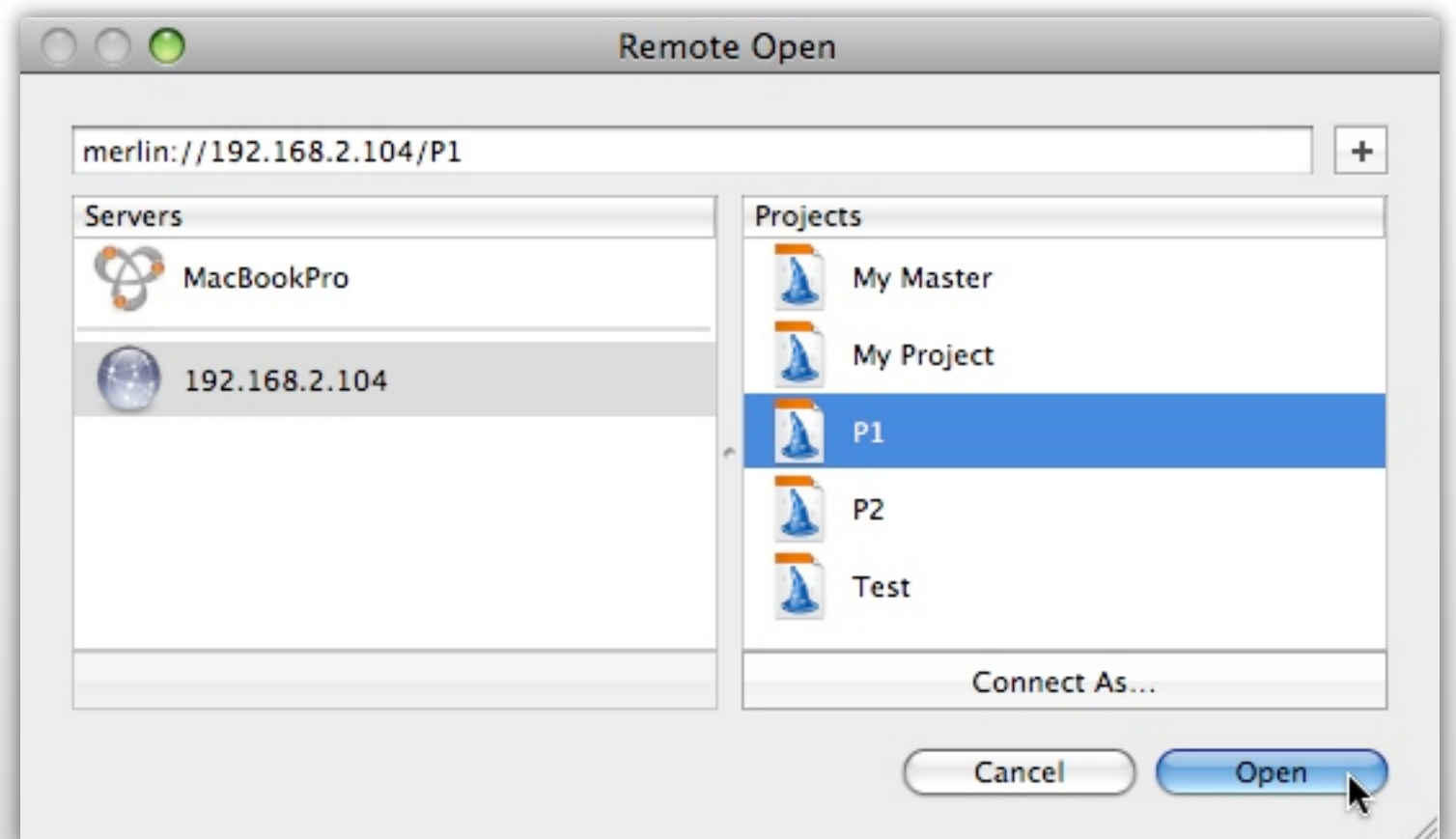
As soon as you click on **start** the project becomes accessible. Based on the IP address of the automatically calculated proxy icon, your project can be accessed in the local network or over the Internet*.

Other Merlin users select **File > Remote Open** to access the file. The **Remote Open** dialogue automatically lists all Merlin or Merlin Server sharing projects in your local network.

Remote Merlin users click on **+** to insert a Server using the IP of the proxy icon.

A *Server* can be a Merlin Server or a Merlin application sharing projects.

* For publishing and availability over the Internet, your router needs to be configured appropriately with UPnP or NAT/SMP.



WEB MODULE

The Web module is available as a separate publishing option for collaboration with users not having Merlin or working on another platform than a Mac. Those users can open and work on a shared project using their web browsers. This platform independent module supports the following web browsers:

- ▶ Safari 3 or higher for Mac OS X or Windows
- ▶ Firefox 3 or higher for Mac OS X or Windows
- ▶ IE 7, IE 8 (only in the compatibility mode) or later for Windows
- ▶ Chrome 24 or later for Mac OS X or Windows

The screenshot displays the MerlinWeb web interface. The top window, titled 'Client-Website - Windows Internet Explorer', shows the 'Merlin' application with a menu bar (File, Edit, Insert, View, Help) and tabs for 'Activities', 'Resources', and 'Utilization'. The 'Activities' tab is active, showing a list of tasks under 'Client-Website' and 'Pre-Production'.

The bottom window, titled 'MerlinWeb', shows the 'Project List' table. The table has columns for 'Title', 'Expected Start Date', 'Expected End Date', and 'Info'.

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 an additional publishing option for your project so it can be opened and worked on using an Apple iPhone, iPad or iPod touch.

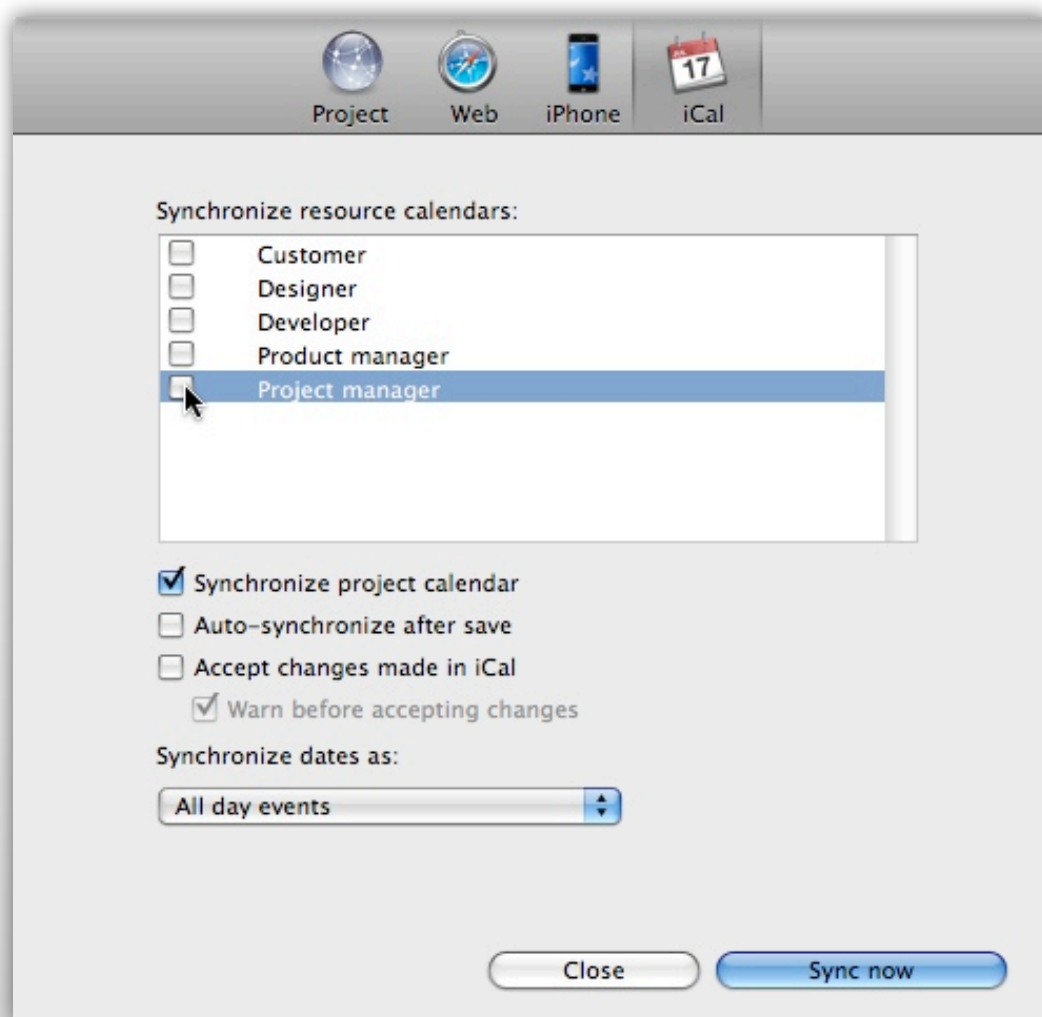
To use it on your iOS device, you need the according Merlin app (free download over the [AppStore](#)).



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 to-do's.

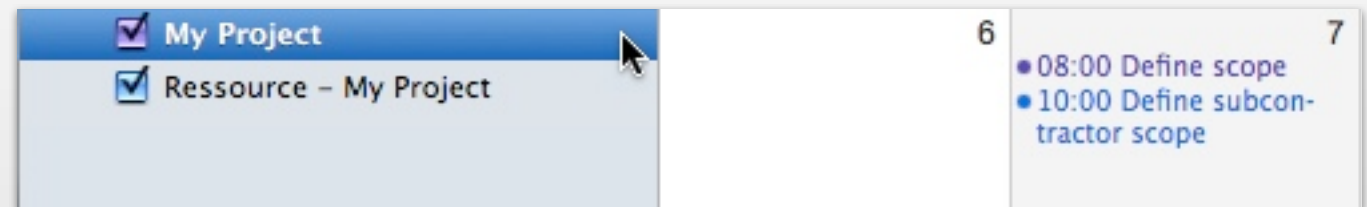
Attention: We recommend you avoid using the option **Accept changes made in iCal**, as this frequently leads to unintended and unwanted modifications to your project.



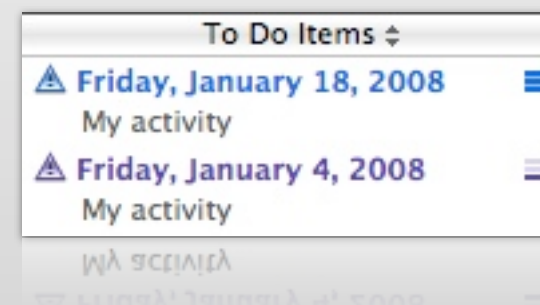
All day events



Events with time



To dos

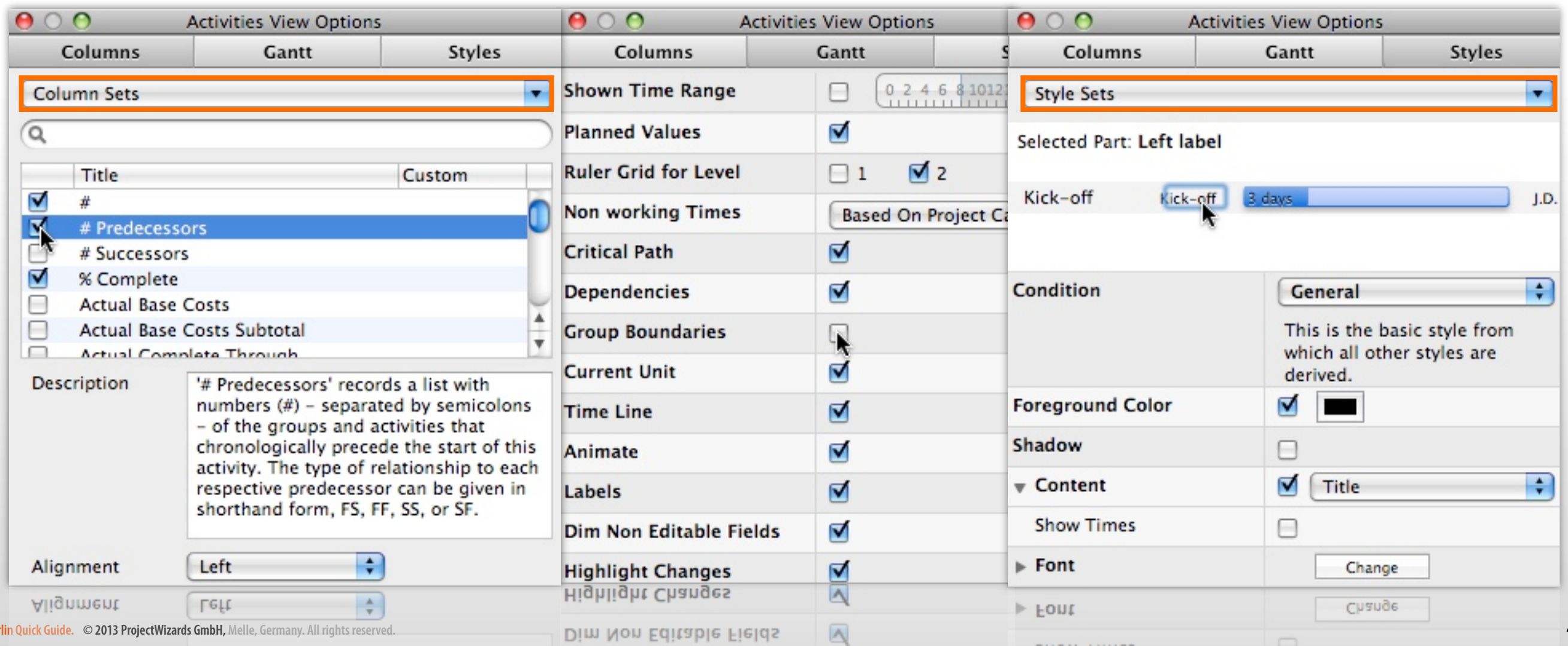


Leopard to-do's also show up in Mail.

VIEW OPTIONS

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

Hint: If you require different types of column sets and styles for reporting or managing your project, you can save them for later use.

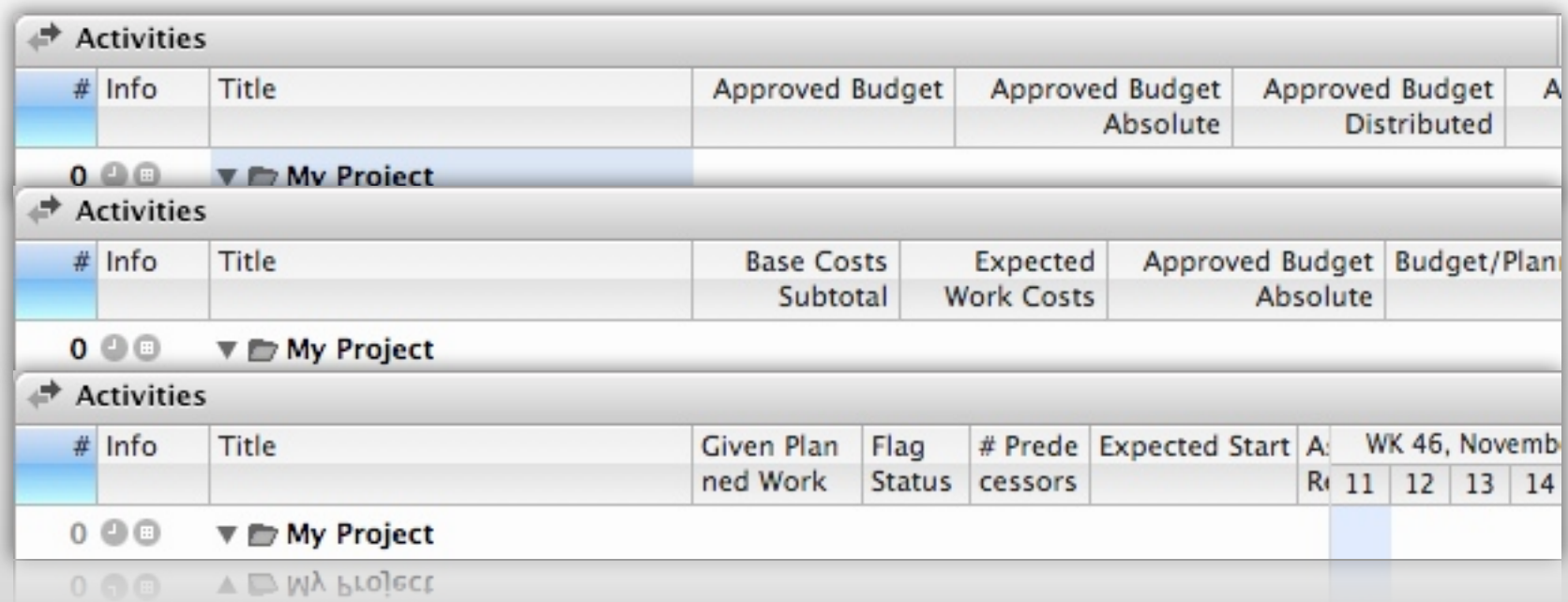
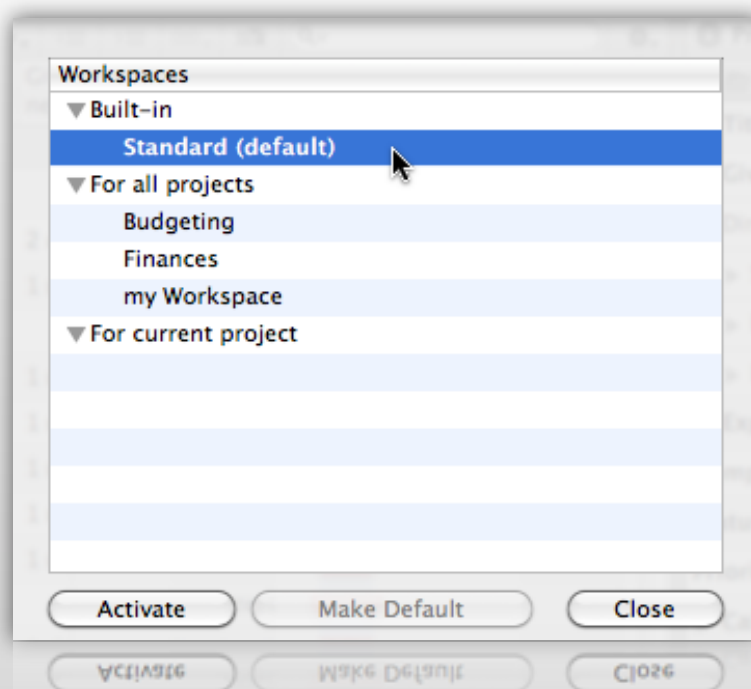


WORKSPACES

Merlin's inherent flexibility allows you to modify the program window and interface in many ways. You can save your favorite display settings (such as the displayed columns), as separate **workspaces**.

Once you have things set up as you like, just go to **Window > Save Workspace** (or press Ctrl - Command - S) and you can save them. You will also find pre-defined workspaces that we have set up for you. To open saved environments go to **Window > Workspaces**.

To view and manage saved environments go to **Window > Manage Workspaces** (or press Ctrl - Command - W).



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