News

in Merlin Project

Contents

About this document

This document describes the changes between Merlin Project 4 and Merlin Project 5.

Merlin, Merlin 2 and Merlin Project are successive versions of the popular project management software for the Mac.

- Merlin 1: 2004
- Merlin 2: 2006
- Merlin Project 3: 2015
- Merlin Project 4: 2016
- Merlin Project 5: 2018

General

- You need at least macOS 10.11.6 to run Merlin Project 5.
- Merlin Project 5 and Merlin Project 4 documents are fully backwards/forwards compatible including for data synchronization whether using cloud services like Dropbox or Merlin Server.
- You do need at least version 4.3.6 of both Merlin Project and Merlin Server to experience the full backward/forward compatibility. Both versions are available free of charge for customers. There are no restrictions with existing installations. *Go ahead and try it out for yourself!*
- The UI now sports a fresh, clean modern design.

The Resource Pool

- A resource pool is a normal Merlin Project document in which you have simply added resources. You can now use this document as a pool in other projects and utilize the same resources there without any additional effort and synchronize their utilization levels.
- To link a pool document, switch to the Project Settings – Utilization tab in a project and add the document to the pool table.
- In the Resources view all available pool resources are now displayed in their own groups.
- To use selected resources from the pools in a project, just drag and drop them from the pool group into the project group:
    - Between existing resources to simply add them, which is typically the case.
    - Onto an existing resource with the same name to link it to the pool resource.

- Resources connected to a pool are marked with a double arrow icon in the Info column in the Resources view.

- Changes to pool resource settings are applied automatically to the projects using the pool.

- However, if you need to configure a resource individually, you can overwrite the associated field in a project. This disconnects it from automatic updating.

- You can then discard these changes manually via a resource's context menu or send them to the pool.

- Optionally, project assignments can be published in the resource pool so other projects can level their assignments.

- Assignments from other projects now also appear in the Assignments view, but can be hidden if required using the view settings.

- By default, the Assignments view only shows the resources used in the actual project. Optionally, you can display unused pool resources including their assignments from other projects.

- You can configure in the project settings whether assignments from the resource pools are taken into consideration during resource leveling.

- There is a new "In Resource Pool" field for activities and assignments.

- There is a new "Resource Pool" field for resources.

Groupings

- There is a new "Groupings" icon in the View toolbar.

- Objects in a view can be grouped dynamically according to preset fields. Where possible, the column values of a group are cumulated. The grouping adapts automatically if the values change.

- We offer the following settings for a grouping:

    - Sorting direction,

    - Groups for every value used,

    - Every possible value,

    - Or for intervals,

    - For the hierarchy of the view objects: Hide, show, flatten.

    - You can also group by multiple fields. The resulting groups are then nested and highlighted in the Project view.

- In the Work Breakdown and Net Plan view, you can rank activities within a group manually when grouping is activated ("Manual Ranking"). If you use manual ranking, a star icon appears in the header of the numbers column. You can reset it via the "Reset Manual Ranking" menu option in the main menu and the table

header's context menu.

- If a view is grouped by a changeable field, objects can also be dragged and dropped manually from one group to another.

- Just like with filters, you can create as many named grouping rules as you like.

Kanban

- The Net Plan view now lets you display activity cards in the form of a classic Kanban board.

- To do so, there is a new Kanban view that groups (or two new Kanban views that group) activities in columns dynamically according to a status field. Before you can use this view, you need to decide which field you want to group by. This can either be a custom field with any status values or by the calculated activity status. To get off to a flying start, we provide several Kanban templates with typical scenarios.

- In the same dialog you can also set how different statuses impact upon the actual level of completion of an activity as well as the minimum or maximum number of activities in a status. If this preset is under/overshot, the column heading will turn red/orange and a warning generated.

- A button beneath the grouping list lets you access the initial selection dialog again.

- If you use a custom field for the Kanban status, you can move activities manually from one column to another. In doing so, the actual level of completion is synchronized according to the Kanban status.

- If the status or the level of completion of an activity changes in a different way other than via the Kanban view, this adapts dynamically: Activities are then also sorted automatically into the correct column.

- The "Actual Start/End" project setting controls which date values are entered in the "Actual Start" and "Actual End" fields when changing the % completed:

  ○ From Expected Values: When changing the level of completion, the previously calculated value is entered based on the time presets and dependencies from the "Expected Start/End" fields.

  ○ From Status Date: When changing the level of completion, the value for the "Actual Start/End" fields is derived from the current status date. The "Granularity" setting controls the level of detail used for the status date.

  ○ Example: It's currently April 6, 2018, 3:30pm and an activity that hasn't been started yet involving 8 days of effort is set to 50% completed → actual start: April 2, 8:00am, if the granularity is set to "Day".

  ○ Automatic: Default setting If your project uses time presets (dependencies, specific date values), it behaves like "From Expected Values" otherwise like "From Status Date".

- You can add a further field of your choice to the active grouping rule in the Kanban view. The resulting subgroupings then appear in clear swimlanes.

Simplified style system

- You can now format table cells individually using the Format menu or the "For Selection" tab in the new styles editor.

- The new styles editor can also be accessed via the new paintbrush icon in the View toolbar.

- In the styles editor you can control the format of views in three basic ways via three tabs:

  - General: Here you set the basic format of a view.

  - By Rules: Here you can use dynamic conditions to set how the view format is to adjust automatically.

  - For Selection: You can customize the format for each row individually. You can reset these settings using the "Format > Clear Style" menu option.

- In each of these tabs, select the view elements to be formatted by clicking an overview graphic. You can also select alternative elements via the overlying popup button.

- The new styles editor now lets you control the content of the Gantt labels, time phases and Net Plan cells. Merlin Project 4 had its own contents inspector for this purpose. You can now access the new styles editor via the context menu's "Style and Content" option. In doing so, the clicked element is preselected.

- If a value appears in gray in the new styles editor, this means it has not been defined explicitly in the edited rule or selection, but originates from another preset. You can access the location of this preset by right-clicking the setting label. If a value has been set explicitly, it appears in white and you can reset it by clicking the X icon.

Additional changes

- In addition to dragging and dropping them with the mouse, in the Resources dialog of the main toolbar you can assign resources to the currently selected activities by clicking the new checkboxes.

- Resources have a new "Image" field into which image files can be dropped, such as an employee's photo. These images are then displayed in the image column in the Resources view and optionally in the resources fields and columns of other views. For this purpose the field has the new "Images" format option. If you drag and drop macOS contacts in to the Resources view, their photos are imported automatically.

- The "Status" activity field now supports the format settings: "Automatic", "Icon and Text", "Text", "Icon", "Fill color".

- If you are working in a project with no dates or dependencies, all activities are set to "Unscheduled".

- Net Plan: There is a new "Grid" layout that arranges activities into columns and which is used by the Kanban view.

- Net Plan: There is a new "Number of Sub-columns" option for organizational chart, outline and grid layouts.

- Custom fields: The "Attention Level" type is now called "Status".

- Pre-defined values from "Status" fields allow mapping and synchronization to activity completion values. This is used inclusive of the new min/max counter in the Kanban board. We provide six templates with pre-defined values to get you off to a flying start with the Kanban system.

Subscription

- To make it easy for more users to get started with professional project management, we offer Merlin Project 5 at a reduced price and as a subscription model: For just $149/year (149 €), including all future updates.

- The subscription model also enables us to offer new functions much sooner and more regularly to customers.

- Good news for existing Merlin Project 4 customers - we have a great offer for you that runs until December 31, 2018: You can get Merlin Project 5 for a fixed price of $99/year (99 €).

- And if you've only recently purchased Merlin Project 4, you can use Merlin Project 5 for up to 18 months free of charge – depending on the date of purchase.