



Resources

Guides for Merlin Project Express

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Resources - as of September 2020

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This guide shows you how to create resources and assignments in Merlin Project Express.

What are resources

Resource is a term for people, materials and equipment used in the project.

Merlin Project Express offers the following **resource types**:

- **Person** (involved in the project actively or inactively)
- **Material**
- **Company**
- **Equipment**



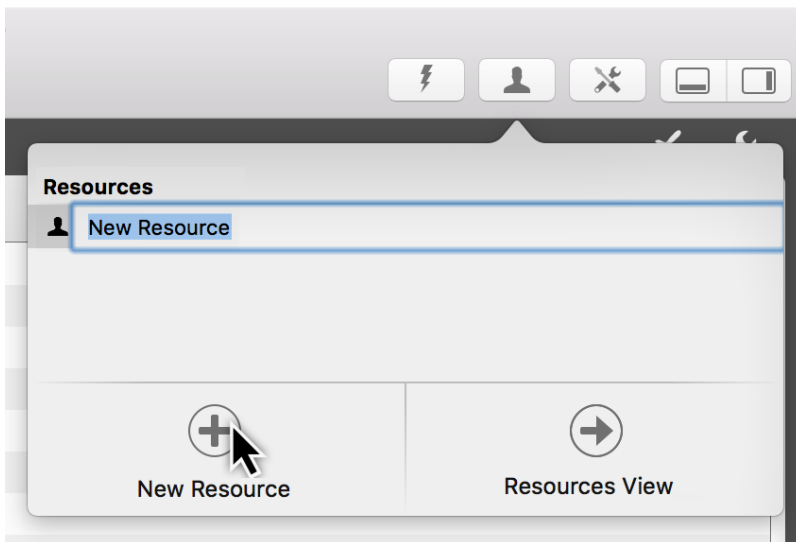
The default **resource type** is **Person**.

Creating resources

The **Resources** toolbar icon opens a *pop-up* window listing all resources in your project.



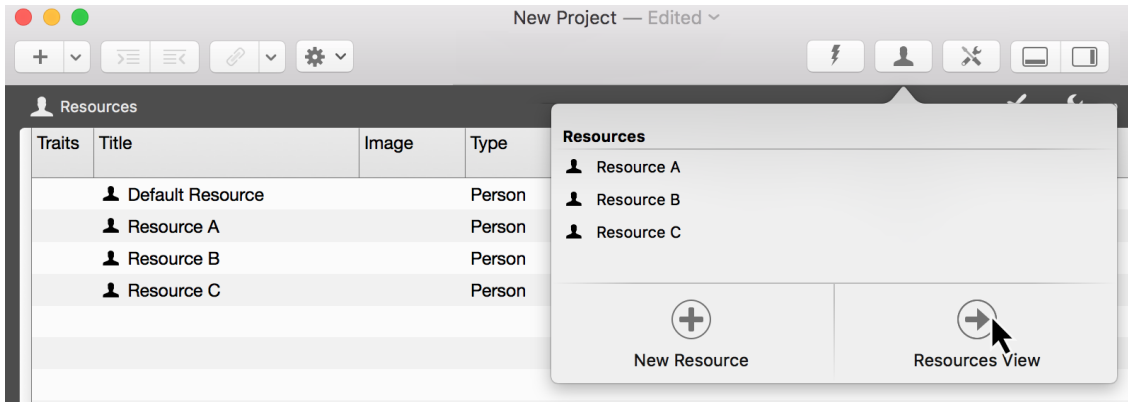
You can quickly create new resources in Merlin Project Express by clicking **New Resource** in the *pop-up* window.



Using resources *pop-up*

The resources *pop-up* is perfect for gaining a quick overview of project resources.

For more information on your resources and for a more detailed edit of the values of your resources, click on **Resources View**. Merlin Project Express will switch quickly to [that view](#).



Switch to the **Resources View** to insert an image for your resource, [thus...](#)

The resources *pop-up* can be used as a separate window. Move the window down with the mouse pointer.





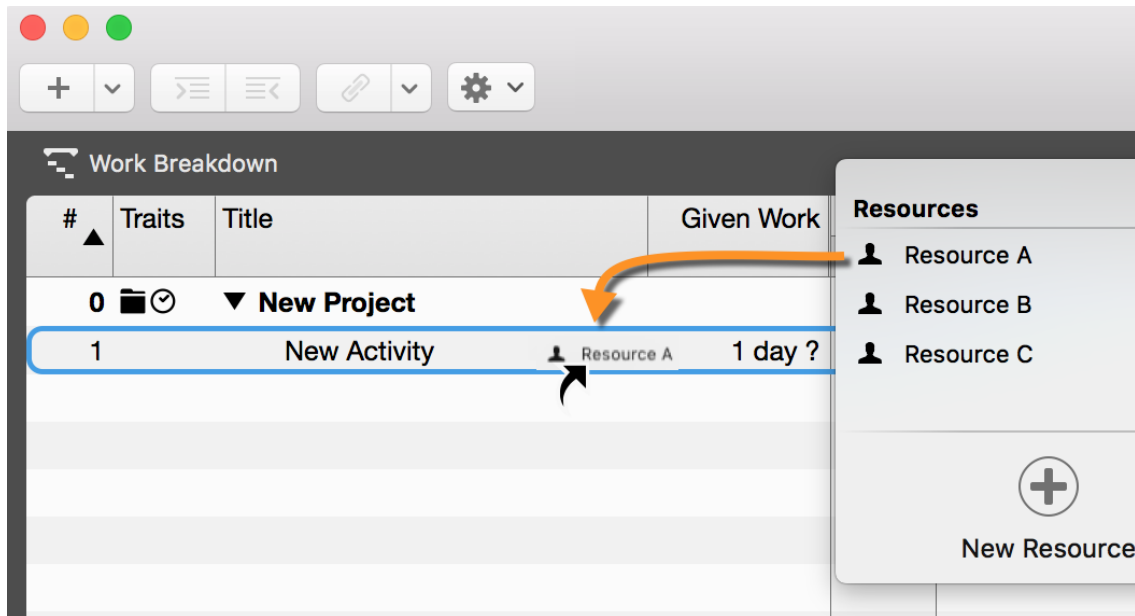
You can quickly show or hide the resources *pop-up* as a separate window using the **F4** key or via the **Window** menu item.

Creating assignments

Move a **resource** from the resources *pop-up* to an activity, group, or milestone. An **assignment** is created automatically.



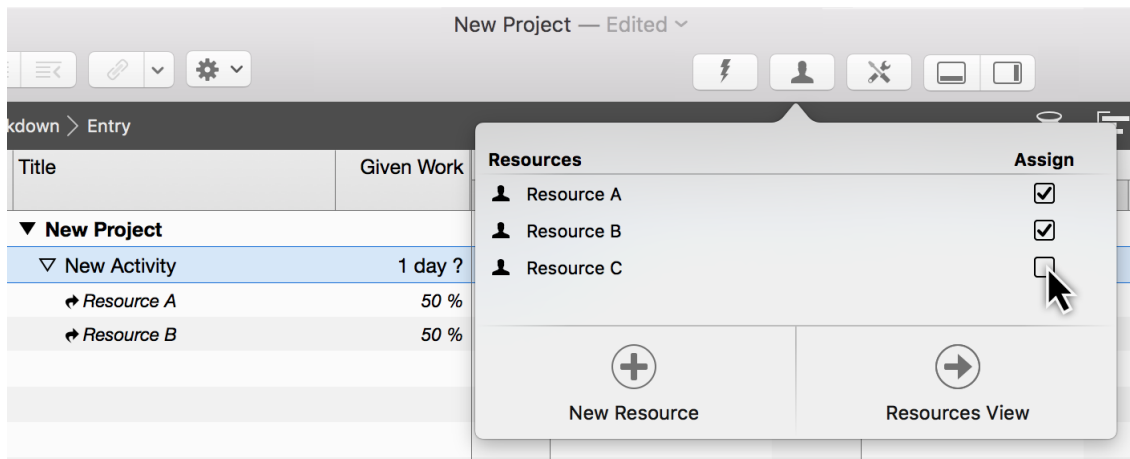
A **resource** assigned to an activity is called an **assignment**. This resource works on the activity assigned to it in the project.



The assignments are identifiable by the **white triangle**. Multiple assignments can be created for an activity and these share the work automatically.

#	Traits	Title	Given Work
0	📁🕒	▼ New Project	
1		▽ New Activity	1 day ?
		↕ Resource A	50 %
		↕ Resource B	50 %

For selected activities in a view, the **Assign** option appears in the resources *pop-up*. This allows you to add additional resources as assignments to the activity quickly by marking the check box.



If the checkmark is removed, the **assigned resource** is also removed from the activity.



You can create new assignments for the selected activities automatically using the **Insert** → **Assignment** menu item or the corresponding shortcut **option + cmd + A**.