



Resources

Guides for Merlin Project

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Resources - as of November 2020

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

What are resources

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

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

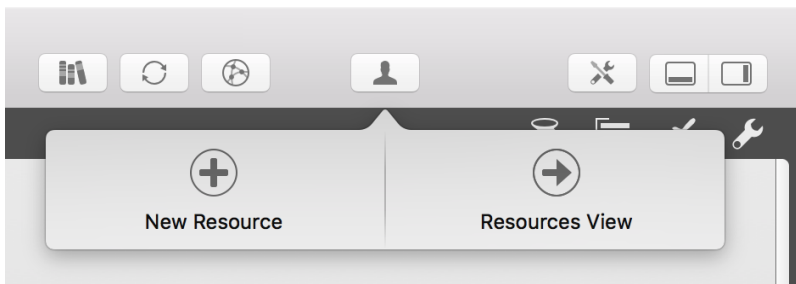
- **Person** (involved in the project actively or inactively)
- **Material**
- **Company**
- **Equipment**



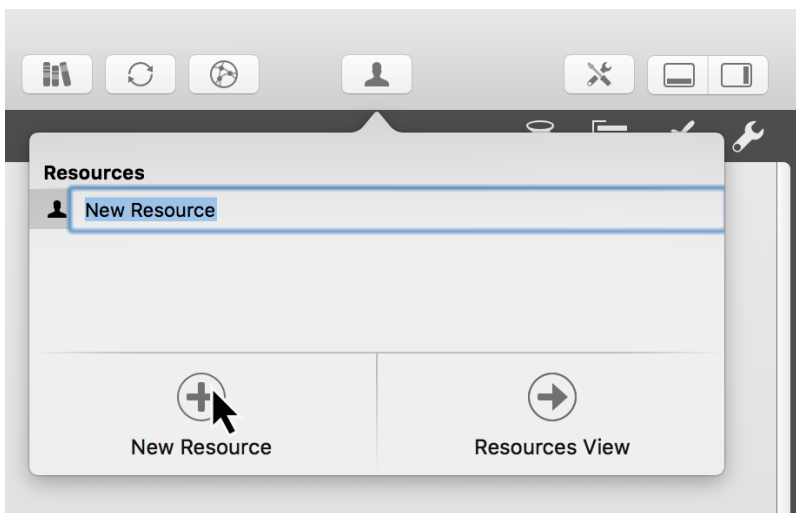
The default **resource type** is **Person**.

Creating resources

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



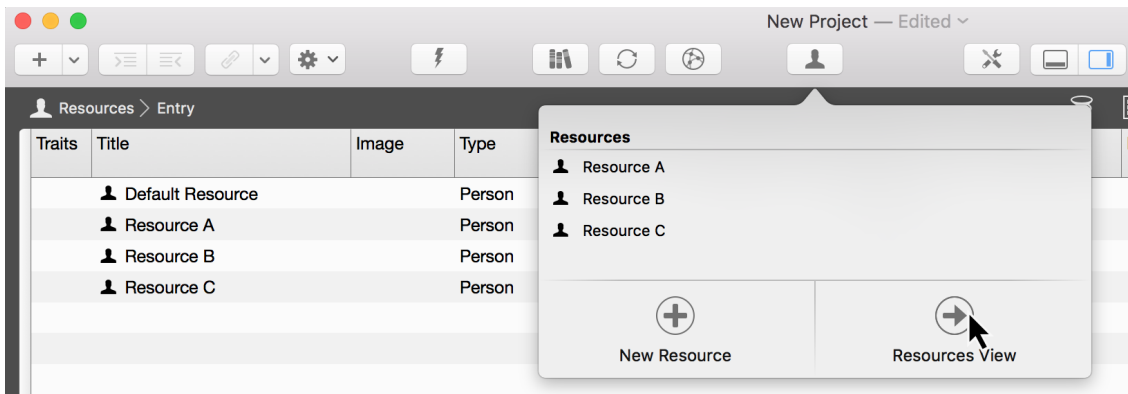
You can quickly create new resources in Merlin Project by clicking **New Resource** in the *pop-up* window.



Using resources *pop-up*

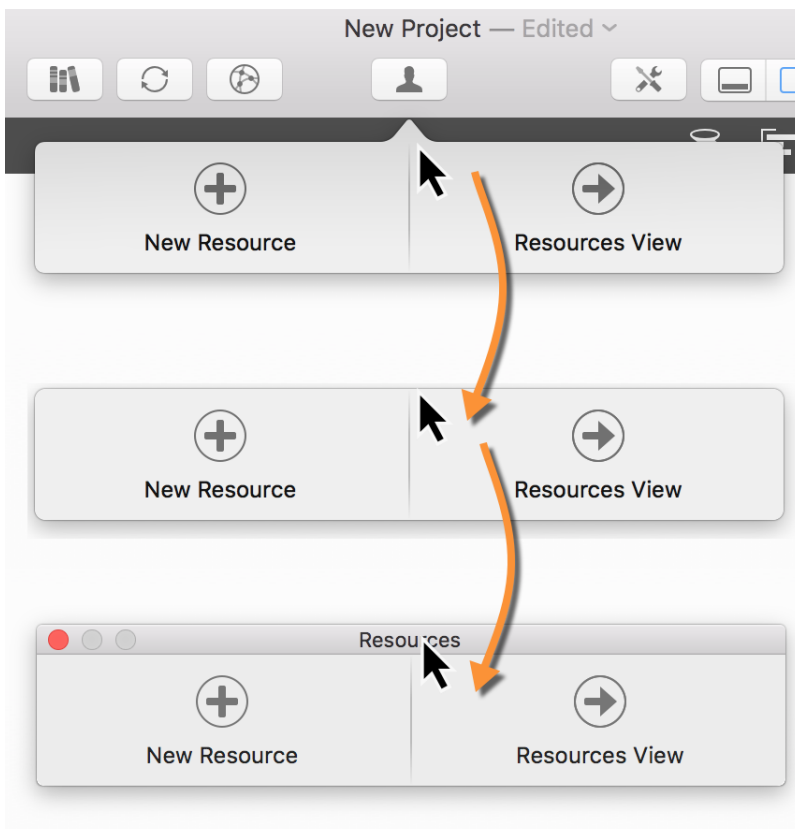
The resources *pop-up* is perfect for gaining a quick overview of project resources.

For more information on your resources and for a more detailed edit of the values of your resources, click on **Resources View**. Merlin Project 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.





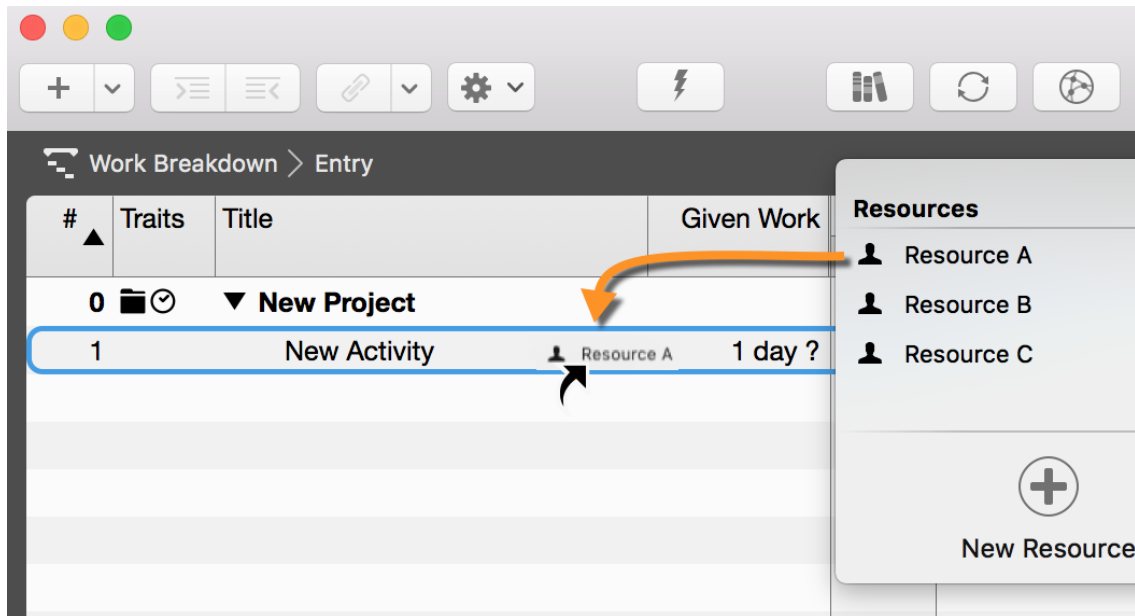
You can quickly show or hide the resources *pop-up* as a separate window using the **F4** key or via the **Window** menu item.

Creating assignments

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



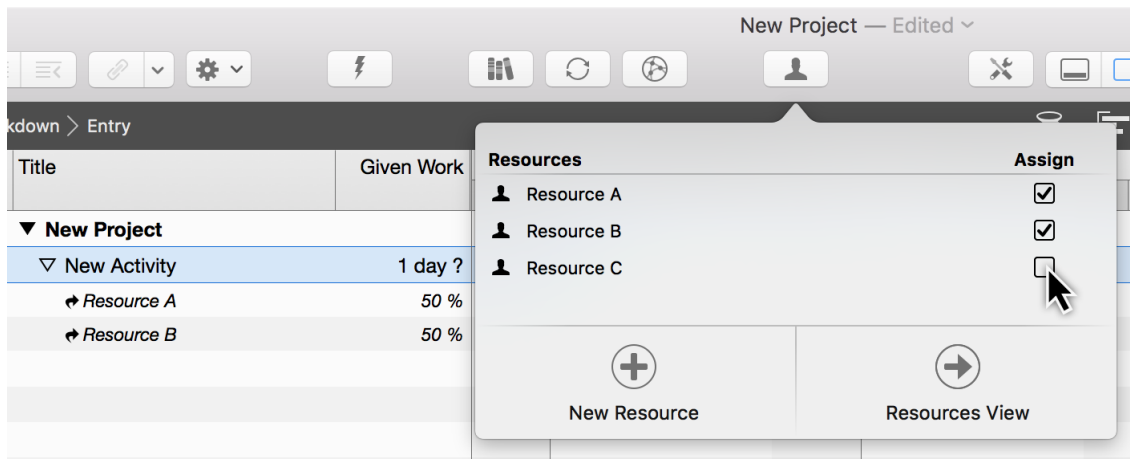
A **resource** assigned to an activity is called an **assignment**. This resource works on the activity assigned to it in the project.



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**.

Assign to contacts from the **Contacts app**

Merlin Project allows you to use **contacts** from the **Contacts app** as resources in your project.

Open the **Contacts app**, select the contacts in question. Use the mouse to drag and drop them on activities, milestones, or groups. These contacts are added as resources to the project and assigned to the activities automatically.

