



Resource Pool

Guides for Merlin Project

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Resource Pool - as of March 2021

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This guide contains information on creating and using resource pools in Merlin Project.

What is a resource pool?

Note for Merlin Project Express users



The following functions are only available in [Merlin Project](#).

A resource pool lets you use the same resources in multiple projects centrally and to level this use across projects.

What's special about a resource pool is that the resources are available for multiple projects, whereby all resource changes are synced automatically across all projects that are using the resource pool.

Advantages in project planning

The resource pool is the perfect solution when working on more than one project where the same resources are used regularly.

The resource pool lets you use the same resources with multiple projects, whereby all the resource information from the resource pool is available to everyone working with projects linked to the resource pool file.

If resources change in the resource pool file, the information is updated automatically in the connected projects.

Using resource pools makes it easier to work on a number of projects with the same resources and assignments.

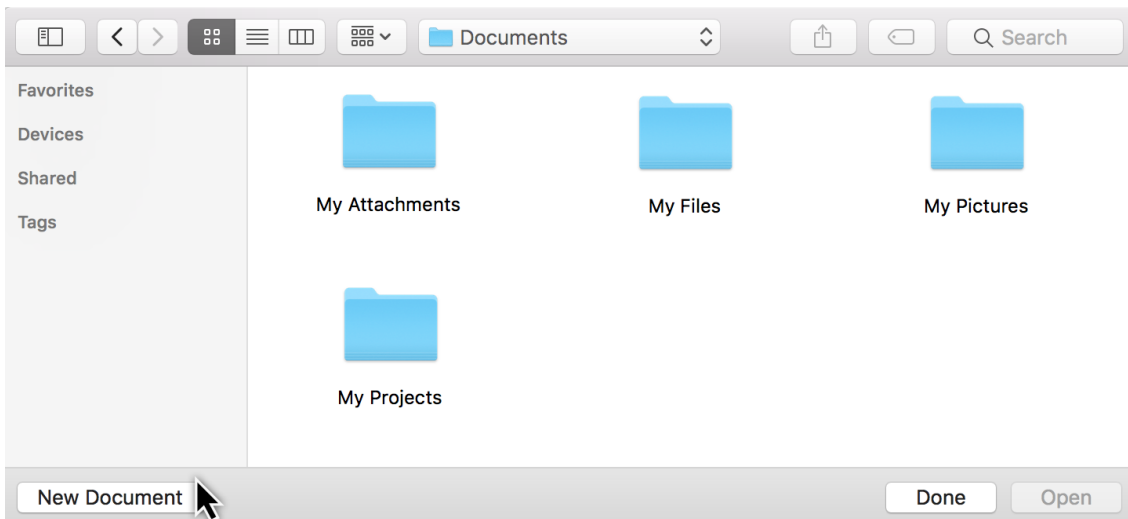
Create a resource pool

You need a new project file to create a new resource pool.

Start Merlin Project and open a new project. To do so, click **File > New** or use the keyboard shortcut **alt + cmd + N**.

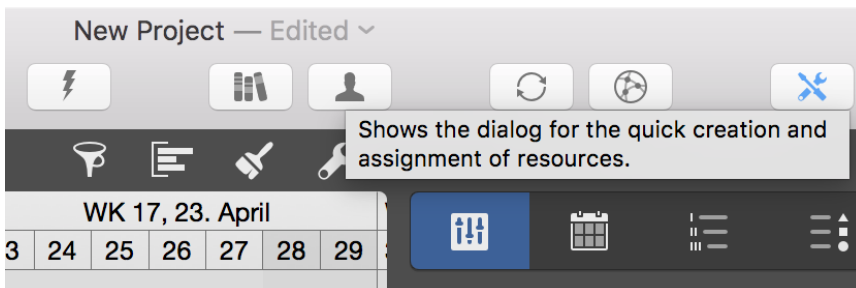


Alternatively, click the **New Document** button on the bottom left in the *Open dialog*.

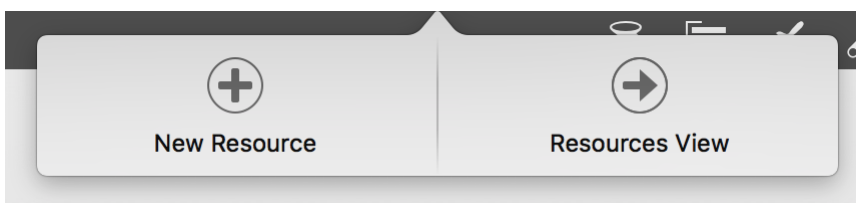


Creating resources

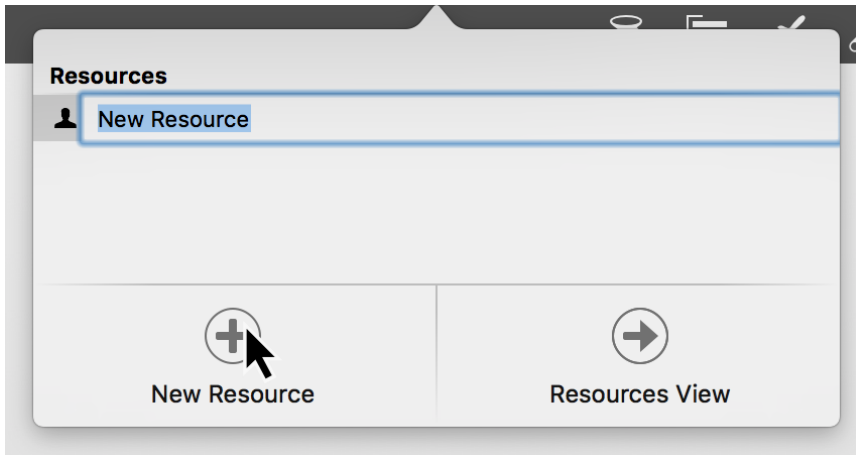
It's quick and easy to create new resources for the resource pool.



Click the *Resources icon* in the *toolbar*.



Then, click the **plus icon** to create a new resource.



Name the new resource. Continue by clicking the **plus icon**. Repeat these steps until you have added all required resources to the resource pool.



If you're in the Resources view, click **Insert** and then the option **Resources** or use the associated keyboard shortcut **cmd + N** to add new resources.

Resources view

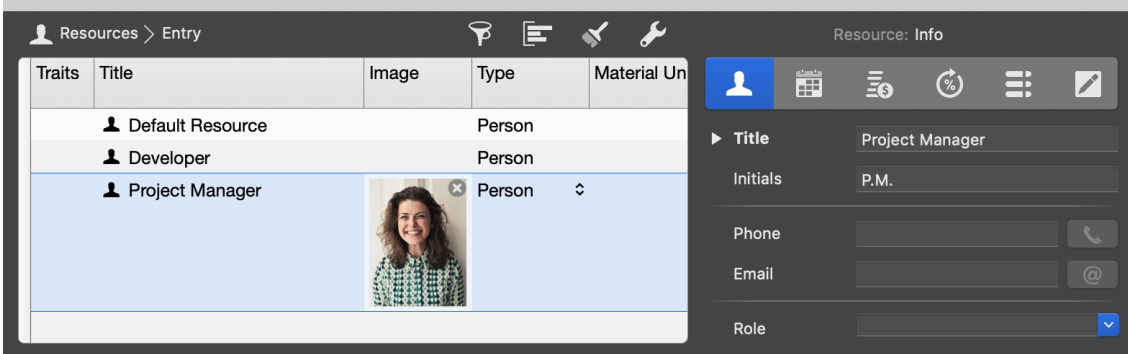
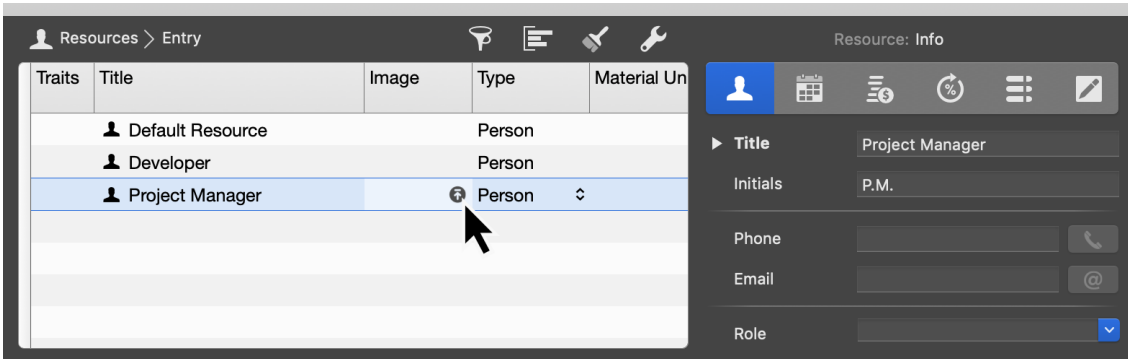
| Traits | Title | Image | Type | Material Unit | Available Units | Project | Initials | Role | Email | Phone | Standard Rate | Overtime Rate | Planned Base Costs | Base Costs Type | Base Costs Accrual |
|------------------|-------|-------|--------|---------------|-----------------|-------------|----------|------|-------|-------|---------------|---------------|--------------------|-----------------|--------------------|
| Default Resource | | | Person | | 100% | New Project | D.R. | | | | | | | Per project | Accrue prorated |
| New Resource | | | Person | | 100% | New Project | N.R. | | | | | | | Per project | Accrue prorated |
| New Resource 02 | | | Person | | 100% | New Project | N.R.0. | | | | | | | Per project | Accrue prorated |
| New Resource 03 | | | Person | | 100% | New Project | N.R.0. | | | | | | | Per project | Accrue prorated |
| New Resource 04 | | | Person | | 100% | New Project | N.R.0. | | | | | | | Per project | Accrue prorated |
| New Resource 05 | | | Person | | 100% | New Project | N.R.0. | | | | | | | Per project | Accrue prorated |
| New Resource 06 | | | Person | | 100% | New Project | N.R.0. | | | | | | | Per project | Accrue prorated |

Switch to the **Resources > Entry** view to edit resources in more detail. In this view, you can find various columns with further information to your resources.

If you select a resource, the **Resources Inspector** is also displayed. It contains all the fields to modify the selected resource.

Image

Click the insert button as shown in the **Image** column, to insert an image for your resources.

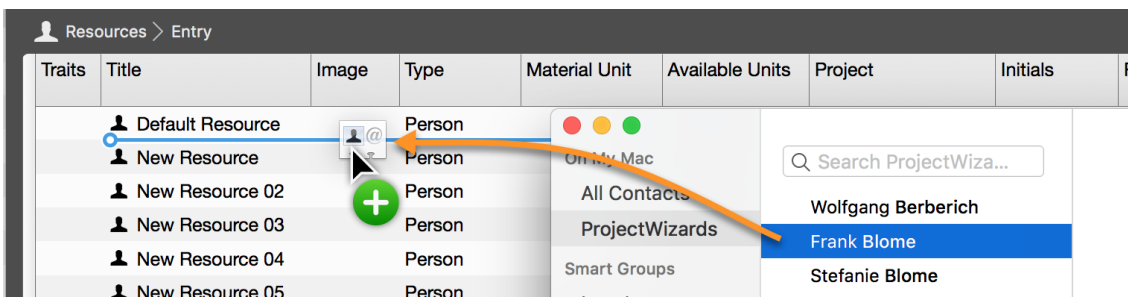


The image will show up in Kanban cards and in any comments this resource inserts into the project.

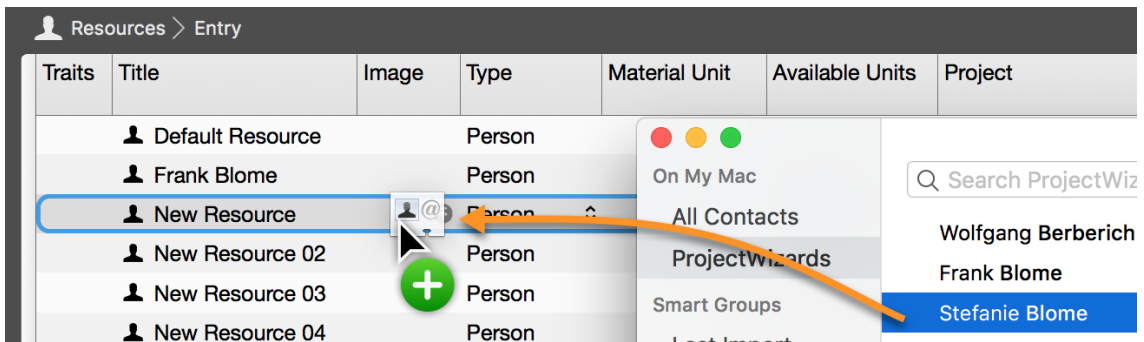
Create resources from contacts

If the Contacts.app or Microsoft Outlook already includes contacts, you can add them directly in the **Resources > Entry** view by using your mouse to drag and drop them, thereby adding them as resources to the resource pool.

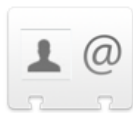
Please note that the **blue lines** perform different functions when adding contacts.



Place the business card **between the rows** and the contact from this card will be **added** to the resource list.



If you place the business card on top of an existing resource (on the line), the contact on the card will replace the resource.



Contact card.vcf



When adding a contact from the *Contacts.app* or *Microsoft Outlook*, business cards are used in the **vCard format**.

If you use other apps that export to the **vCard (.vcf) format**, these contacts can also be dragged and dropped to the Resources view and used as resources.

The information in the **vCards** is imported automatically into the individual columns in the Resources view. This includes the contact's photo, email address, and telephone number if these details are included in the **vCard**.

Add a resource pool to projects

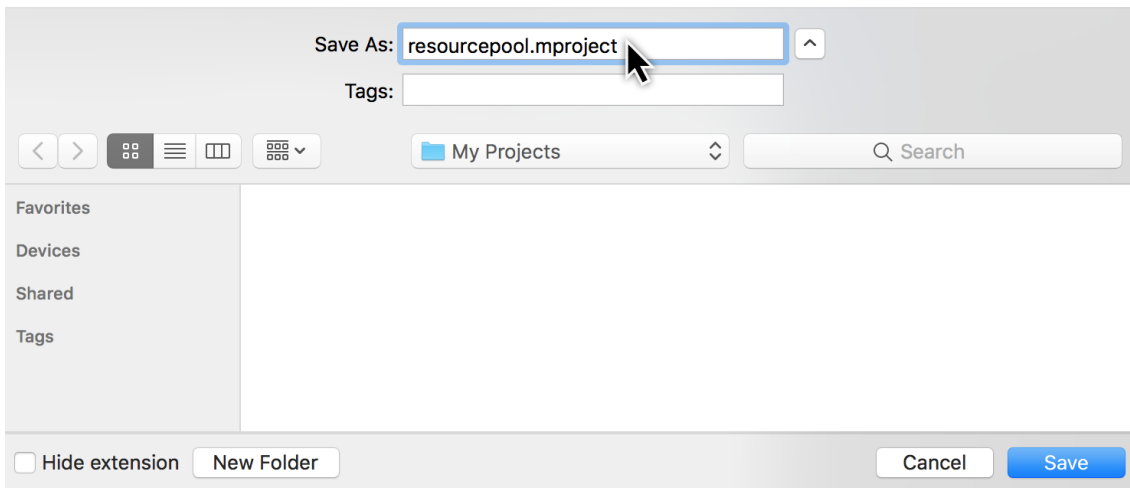
Once all the resources and required information, such as standard rates (meaning the cost of the resource per time unit), have been fully entered in the resource pool, save the file.

To do so, click **File > Save** or the keyboard shortcut **cmd + S**.

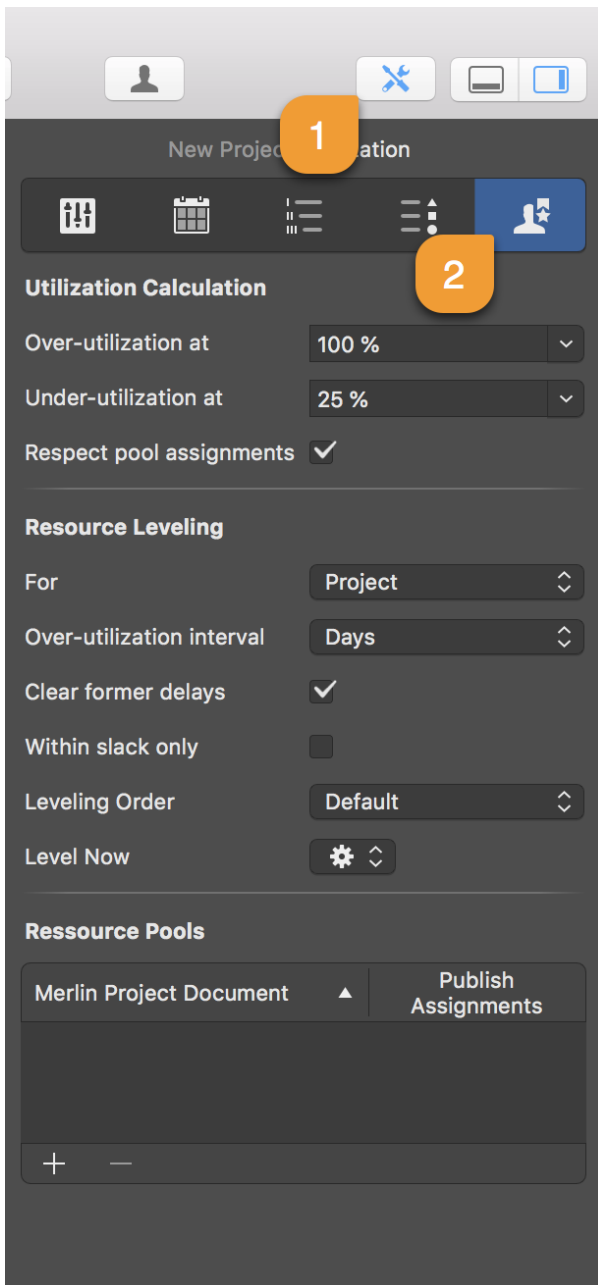
Name the resource pool file and then click **Save**.



The filename will be used for the resource pool in the Resources view.



Open a new or blank project in which you want to use the resource pool file.

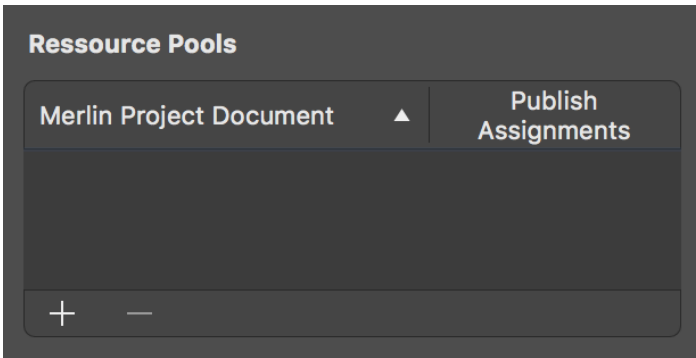


In the toolbar, click the **Settings** icon (1) and select the first icon on the right, the **Utilization** tab (2).

In the **Utilization** Inspector you will find the **Respect pool assignments** option in the **Utilization Calculation** area.

It is activated by default. If the project includes resource assignments from resource pools, they are taken into consideration in the utilization calculation. Unmark the checkbox and the pool assignments will not be included in the utilization calculation.

The **Resource Pools** list is located in the lower area.

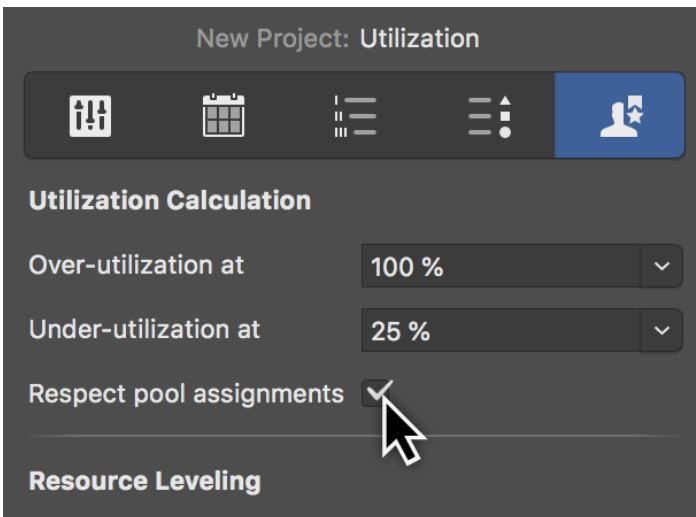


Here you can add, remove, and edit pool files for the opened project as resource pools.

The **Publish Assignments** option shows all assignments from the projects in the resource pool file. This option is activated by default. Unmark the checkbox if you do not want assignments to appear in the pool file.



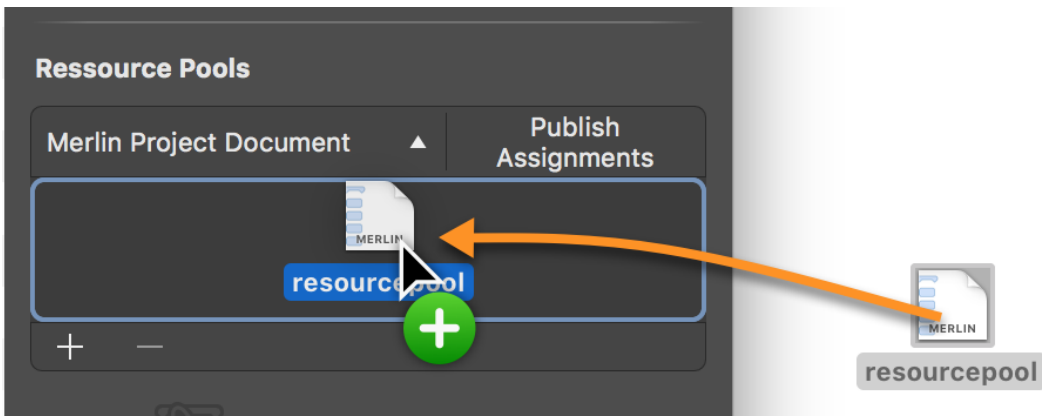
This is useful for projects containing confidential information where you do not want this information to appear in the pool file.



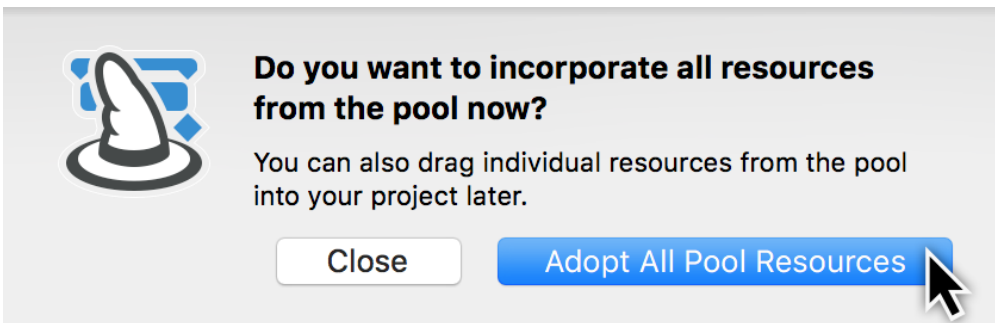
See the Utilization guide for further information on the topic.

Add a resource pool using the mouse

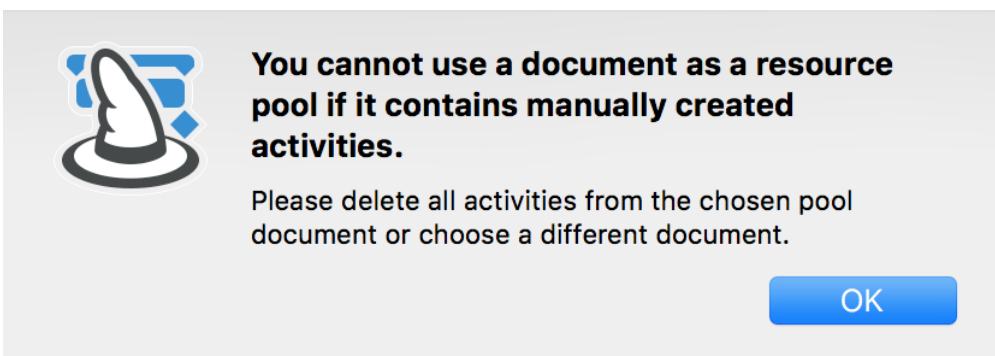
The easiest way to use one or more project files as a resource pool is to drag and drop it/them into the Inspector field using the mouse.



When adding the resource pool, you can adopt all resources automatically.

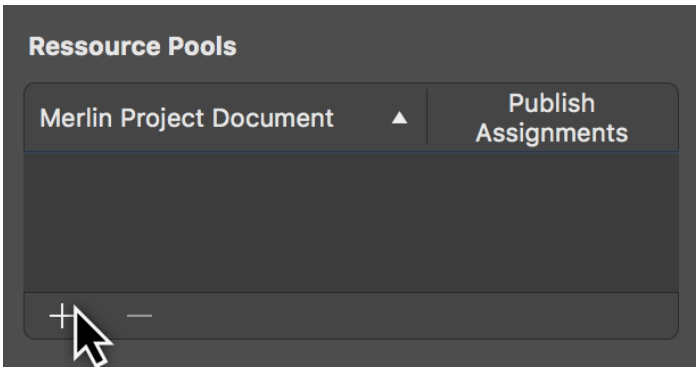


Project files with activities cannot be used as a resource pool. If the project file contains activities, the following dialog is displayed.



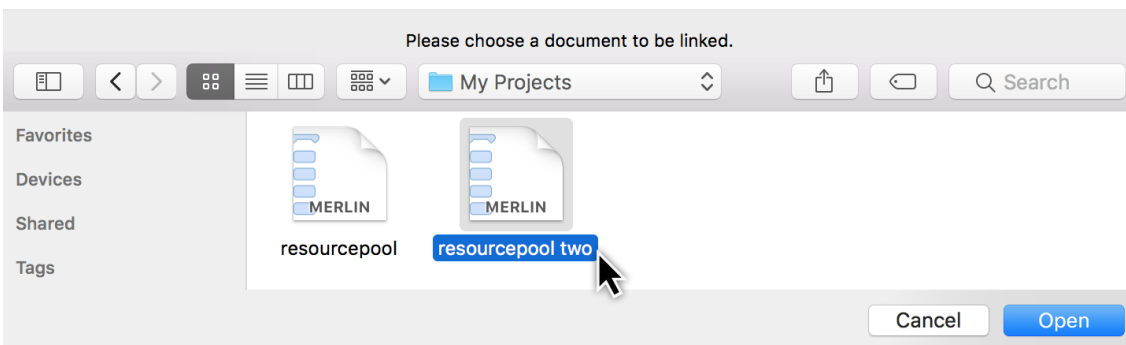
First delete the activities from the project file to then use it as a resource pool.

[Add a resource pool using the icon](#)



Use the **plus icon** to add one or more resource pools.

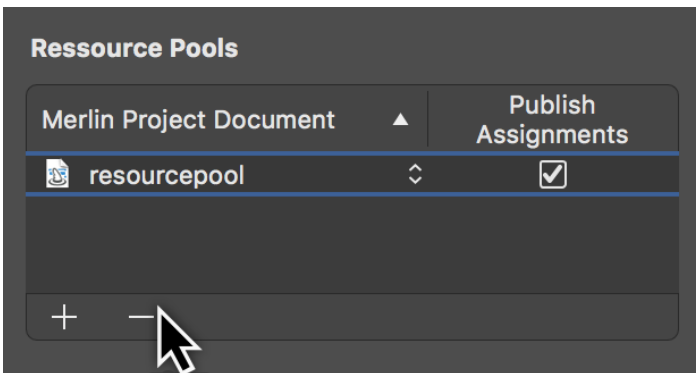
In the *Open dialog* click a project file you want to use as a resource pool.



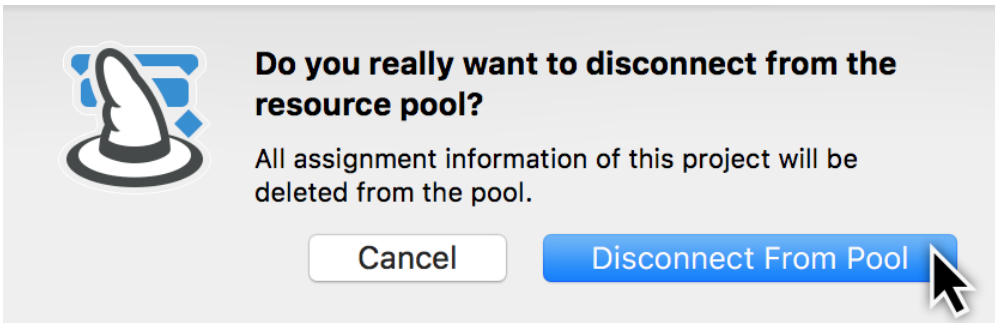
Repeat this process if you want to add further resource pools.

Removing resource pools

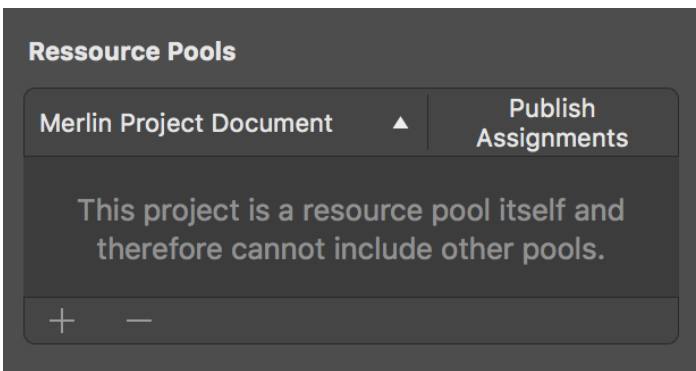
Select one or more resource pools from the list and either use the delete key or click the **minus icon**.



The connection to the resource pool will be removed from the project and the following notification will be displayed.



Only delete the connection if you are certain that you no longer want to update the resources. While the resources will remain in the project, they won't be updated by any changes. This means that the original resource pool file will no longer be connected to.



No resource pools can be included in a project file that is already being used as a resource pool.

Using resource pools

After including a resource pool in the project, the resources are listed in the **Resources view**.

In this view, all resources from the resource pool are included and listed in the project. These resources are marked with a **double-headed arrow icon** in the **Info column**.

| Traits | Title | Image | Type | Material Unit | Available Units | Project | Initials |
|------------------|--------------------|-------|--------|---------------|-----------------|--------------|----------|
| ▼ 📁 New Project | | | | | | | |
| | 👤 Default Resource | | Person | | 100% | New Project | D.R. |
| ↔ | 👤 Resource 01 | | Person | | 100% | New Project | R.0. |
| ↔ | 👤 Resource 02 | | Person | | 100% | New Project | R.0. |
| ↔ | 👤 Resource 03 | | Person | | 100% | New Project | R.0. |
| ↔ | 👤 Resource 04 | | Person | | 100% | New Project | R.0. |
| ↔ | 👤 Resource 05 | | Person | | 100% | New Project | R.0. |
| ↔ | 👤 Resource 06 | | Person | | 100% | New Project | R.0. |
| ↔ | 👤 Resource 07 | | Person | | 100% | New Project | R.0. |
| ▼ 📁 resourcepool | | | | | | | |
| | 👤 Resource 01 | | Person | | 100% | resourcepool | R.0. |
| | 👤 Resource 02 | | Person | | 100% | resourcepool | R.0. |
| | 👤 Resource 03 | | Person | | 100% | resourcepool | R.0. |
| | 👤 Resource 04 | | Person | | 100% | resourcepool | R.0. |
| | 👤 Resource 05 | | Person | | 100% | resourcepool | R.0. |
| | 👤 Resource 06 | | Person | | 100% | resourcepool | R.0. |
| | 👤 Resource 07 | | Person | | 100% | resourcepool | R.0. |

The resource group in the resource pool is represented below the project resources by a folder with a **double-headed arrow icon**.

Click the triangle to expand and collapse the resource folder.



The resource pool folder has the same name as the corresponding resource pool file from which it obtains the resources.

Dragging and dropping resources from the pool into the project

To integrate resources from the resource pool into the project, switch to the **Resources** view.

| Traits | Title | Image | Type |
|----------------|------------------|-------|--------|
| ▼ My Project | | | |
| | Default Resource | | Person |
| ↔ | John Doe | | Person |
| ↔ | Jane Doe | | Person |
| ↔ | Resource 02 | | Person |
| ↔ | Resource 03 | | Person |
| ↔ | Resource 04 | | Person |
| ↔ | Resource 05 | | Person |
| ↔ | Resource 06 | | Person |
| ↔ | Resource 07 | | Person |
| ▼ resourcepool | | | |
| | Jane Doe | | Person |
| | Resource 02 | | Person |
| | Resource 03 | | Person |

Using the mouse, drag and drop the desired resource(s) from the resource pool into the resources area in the project.

Dragging and dropping resources from the project into the pool

To integrate resources from the project into the resource pool, switch to the **Resources** view.

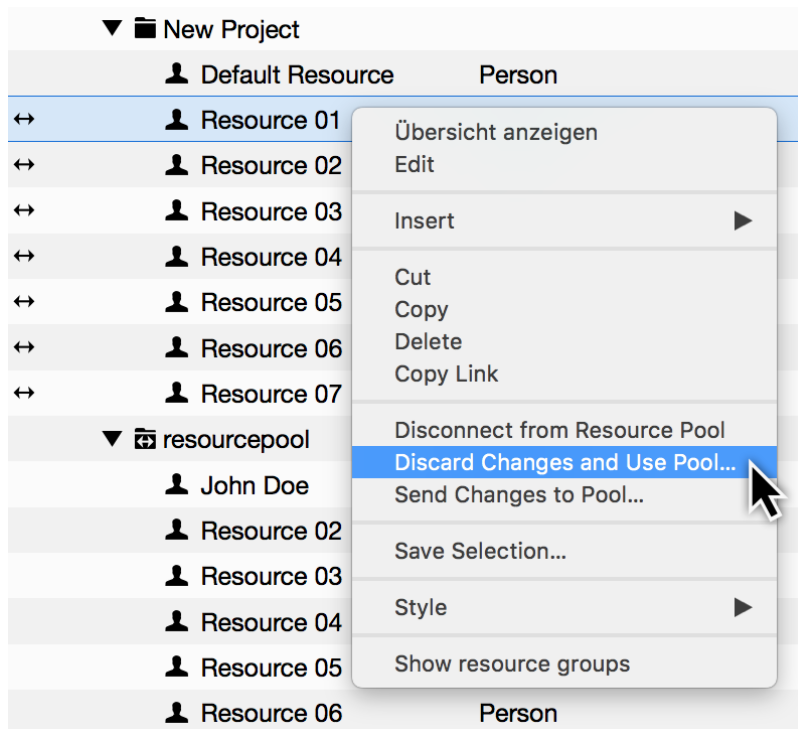
| | | | |
|----------------|-----------------------|--|--------|
| ▼ My Project | | | |
| | Default Resource | | Person |
| ↔ | John Doe | | Person |
| | Resource from Project | | Person |
| ↔ | Jane Doe | | Person |
| ↔ | Resource 02 | | Person |
| ↔ | Resource 03 | | Person |
| ↔ | Resource 04 | | Person |
| ↔ | Resource 05 | | Person |
| ↔ | Resource 06 | | Person |
| ↔ | Resource 07 | | Person |
| ▼ resourcepool | | | |
| | John Doe | | Person |
| | Jane Doe | | Person |
| | Resource from Project | | Person |
| | Resource | | Person |

Using the mouse, drag and drop the desired resource(s) from the project into a resource pool area.

Updating from the resource pool

If you want to update project resource information to the latest status of the connected resource pool, switch to the **Resources** view.

Then, *right-click* one or multiple resources.



In the context menu, click **Update From Resource Pool**.

All new information on the resource will then be sent from the resource pool, thereby updating it.

Updating the resource pool

If you want to transfer information from resources in the project to the connected resource pool, switch to the **Resources** view.

Then, *right-click* one or multiple resources.

| Traits | Title | Image | Type | Materia |
|------------------|--------------------|-------|--------|---------|
| ▼ 📁 New Project | | | | |
| | 👤 Default Resource | | Person | |
| ↔ | 👤 Resource 01 | | | |
| ↔ | 👤 Resource 02 | | | |
| ↔ | 👤 Resource 03 | | | |
| ↔ | 👤 Resource 04 | | | |
| ↔ | 👤 Resource 05 | | | |
| ↔ | 👤 Resource 06 | | | |
| ↔ | 👤 Resource 07 | | | |
| ▼ 📁 resourcepool | | | | |
| | 👤 John Doe | | | |
| | 👤 Resource 02 | | | |
| | 👤 Resource 03 | | | |
| | 👤 Resource 04 | | | |
| | 👤 Resource 05 | | | |
| | 👤 Resource 06 | | Person | |

- Übersicht anzeigen
- Edit
- Insert ▶
- Cut
- Copy
- Delete
- Copy Link
- Disconnect from Resource Pool
- Discard Changes and Use Pool...
- Send Changes to Pool...**
- Save Selection...
- Style ▶
- Show resource groups

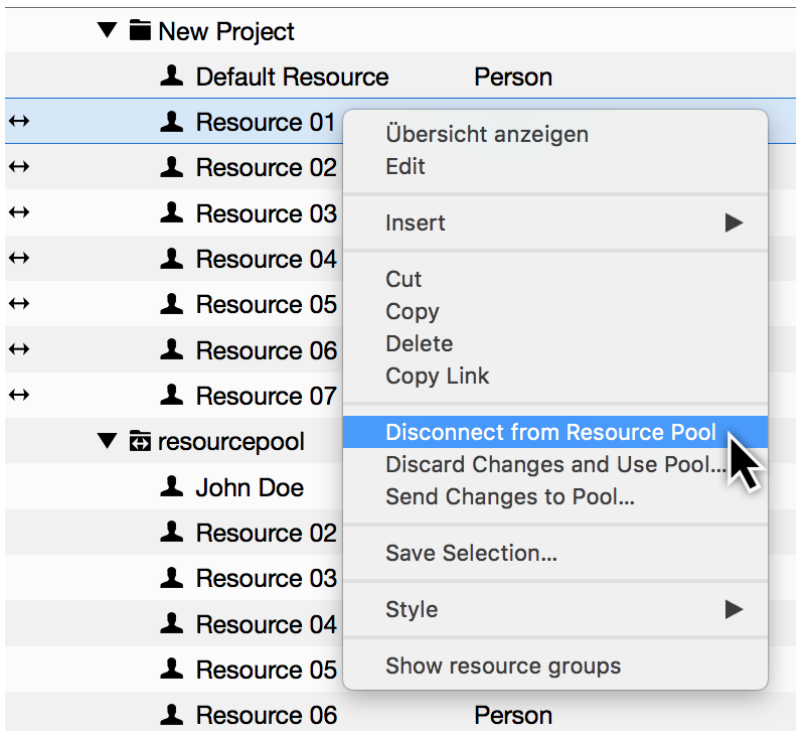
In the context menu, click **Update Resource Pool**.

All new information on the resource will then be sent to the resource pool, thereby updating it.

Disconnecting from the resource pool

If you want to make resources independent of the resource pool, switch to the **Resources** view.

Then, *right-click* one or multiple resources.



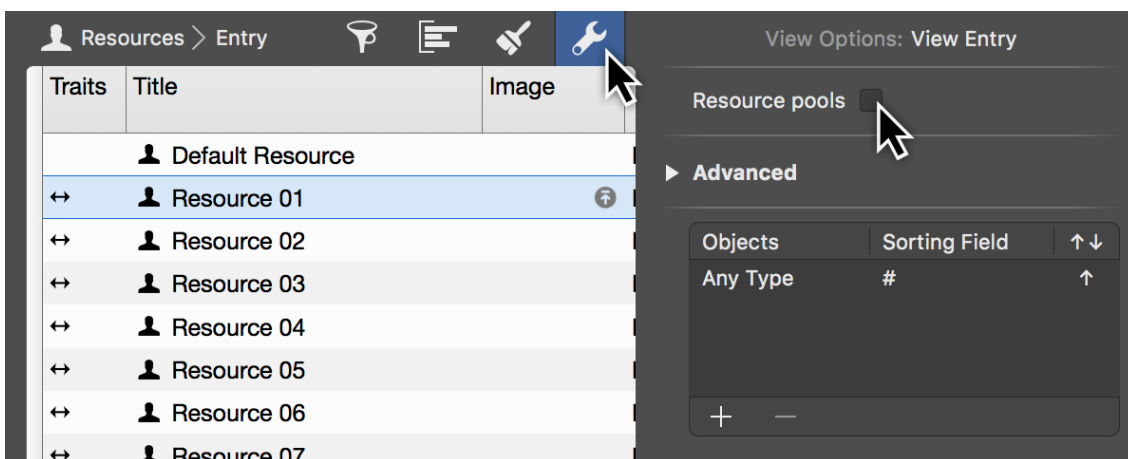
In the context menu, click **Disconnect From Resource Pool**.

All new changes and modifications to resources disconnected from the resource pool will now only be saved in the project, with no updates sent to or from the resource pool.

Showing/hiding the resource pool

The resource pool is shown in the **Resources** and **Assignments** views. This causes resources to be displayed multiple times in the project and resource pools.

To show/hide these options, click the **View Options** icon.



In the **View Options Inspector** mark/unmark the checkbox next to the **Resource Pools** option.

This option lets you show/hide all resource pools in the view.



The resources connected to a resource pool are marked by a ***double-headed arrow icon*** in the ***Info column*** if you have chosen to hide resource pools.