

# TOPIC A

## Share Resources

In an organization, resources often work on multiple projects. It can be challenging to understand who is available. However, sharing resources across projects can make this challenge much easier. In addition, you can centralize information about the resources so that you don't have to keep them updated in multiple places.

### Resource Pools

A **resource pool** is a single central file that contains resource information for one or more project plans. Each project plan that uses the resources listed in the resource pool is called a **sharer file**. Resource pools provide sharer files with a centralized, consistent, and current source of resource information.

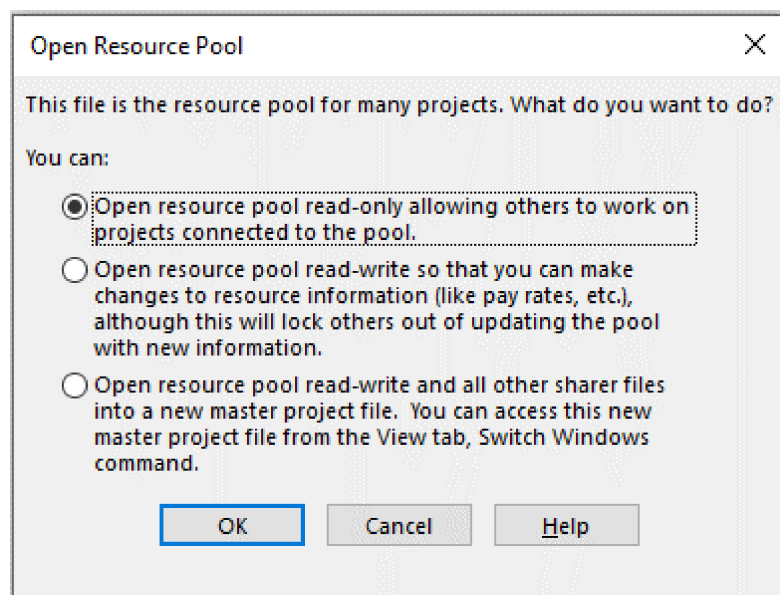
You can use a resource pool to assign resources to project tasks, identify assignment conflicts, and show any resource **overallocations** for each project. Resource pools are created by saving a blank project plan file that contains only information about resources. If you use Project Professional and your organization uses an enterprise resource pool, such as with Microsoft Project Server or Project Online, you don't need to create another resource pool.



**Note:** When saving a new resource pool, it is a good idea to put the words "Resource Pool" in the file name, so that it can be distinguished from other project plans that contain tasks and assignments.

### The Open Resource Pool Dialog Box

After the first time resources have been shared, each time you open the resource pool you will be asked how you want to use it.



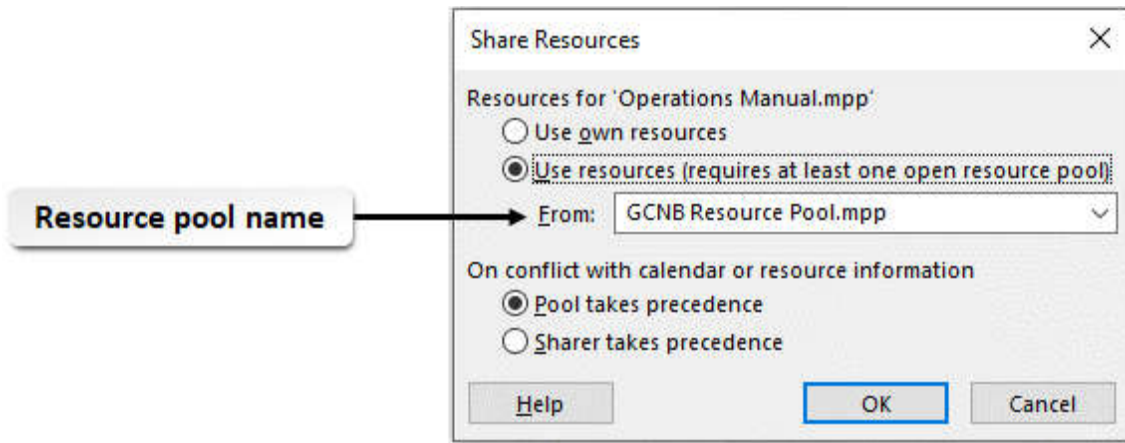
**Figure 5-1:** You can select how you want to use the resources in a resource pool.

You will most often select the first option, so other users of the resource pool can use the resources but not make changes to them (calendar, rates, etc.). The second option will allow only you to make

changes to the resources. The third option will open the sharer projects and the resource pool into a new master project.

## The Share Resources Dialog Box

After you create a resource pool, the resource information for each shared project comes from this resource pool. All information, like assignments, cost rates, and availability, is in this central location. You can choose whether to use local resources or a resource pool in the **Share Resources** dialog box. Select **Sharer takes precedence** if you want information in your project to override any conflicting information from the resource pool.



*Figure 5–2: Share resources between projects with the Share Resources dialog box.*

### The Open Resource Pool Options

When you open a resource pool that is shared by other project plans, you have a few options. You can open the resource pool as read only. Most often, you will use this option because it allows others to work on project plans linked to the pool. If you need to modify the resource pool, you should open it in the read-write mode; this lets you directly save edits to the pool, but it prevents sharer files from updating the resource pool.

### Precedence

By default, if conflicts arise between a sharer file and a resource pool, the resource pool will overwrite the resource information in the sharer file because the resource pool has precedence over the sharer file. For instance, if a sharer file states that Editor 1 makes \$20/hour and the resource pool states that Editor 1 makes \$25/hour, the \$20 rate in the sharer file will be overwritten by the resource pool's data—\$25/hour rate. Ordinarily, it is preferable to give precedence to the resource pool; however, if a project plan is considered critical, the sharer file may be given precedence.

### Discontinue Sharing Resources

If the time comes when you want to stop sharing resources with a resource pool or sharer project, you can do so by selecting the **Use Own Resources** option in the **Share Resources** dialog box. When you disconnect from a resource pool, the sharer file retains assignment and resource information.



Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Share Resources.

# ACTIVITY 5–1

## Sharing Resources

### Data Files

C:\091099Data\Working with Multiple Projects\GCNB Resource Pool.mpp

C:\091099Data\Working with Multiple Projects\Operations Manual.mpp

### Before You Begin

Microsoft Project is installed on your computer.

### Scenario

You have decided to centralize your resources in a resource pool. You already created a new blank project plan file and copied your resources into it. You have also created a project plan for the new Operations Manual that will be produced, but there are no resources in the plan. Now, you want to modify this plan file to use resources from the new resource pool.

1. Open the **GCNB Resource Pool.mpp** project plan file.
  - a) Select **File**→**Open**, then select **Browse**.
  - b) Navigate to the **C:\091099Data\Working with Multiple Projects** folder containing your class files.
  - c) Select **GCNB Resource Pool.mpp** and select **Open**.



**Note:** If the resources have been previously shared, select **Open resource pool read-only** from the dialog box. (You will not see the dialog box the first time the resource pool is opened).

2. Open the **Operations Manual.mpp** project plan file.
3. Select the resource pool.
  - a) Select **Resource**→**Resource Pool**.
  - b) From the **Resource Pool** drop-down, select **Share Resources**.
  - c) In the **Share Resources** dialog box, select the radio button **Use resources (requires at least one open resource pool)**, and from the **From** drop-down list, select **GCNB Resource Pool.mpp**.
  - d) Confirm that **Pool Takes Precedence** is selected.
  - e) Select **OK**.
4. Select **Resource**→**Assign Resources** and see that all of the resources are included and ready to be assigned to tasks, then select **Close** to close the **Assign Resources** dialog box.
5. Save the **Operations Manual.mpp** file, and close it.
  - a) Select **File**→**Save As**.
  - b) Navigate to the **C:\091099Data\Working with Multiple Projects** folder.
  - c) In the **Save As** dialog box, change the file name to ***My Operations Manual***
  - d) Select **Save**.
  - e) Select **File**→**Close**.

6. Close the **GCNB Resource Pool.mpp** file. When prompted to save the resource pool, select **Yes**.
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