MERLIN X QUICK START

MerlinOne

Login

- Point any web browser to the your Merlin's web address (check with your local support staff or MerlinOne for this information) NOTE, some sites using single-sign-on (SAML) may bypass this screen!
- Enter your username and password in the data entry area. (check with your local support staff or MerlinOne if you need help with your user id or password)
- Your login screen may look different. Admin users may set the banner, photos and text that are displayed on the login screen.

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Arrange your window

Admin/Options   Tool Bar   View Selector   Palettes

Palette Drag

Sidebar Controls

Arrange the screen by opening, closing or dragging palettes to arrange them.

- Expand palette options
  - "Twist" to close/open
- Close/Open Sidebars
- Select your view using the "View Selector"
  - Gallery
  - List
  - Single
- Search
- Saved Searches
  - Private
  - Shared
- Metadata
- Collections
  - Private
  - Shared)
- Workflows (Server Targets)

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Toolbar

From left to right:
- Home
- Featured Content (appears when Featured Content has been configured)
- Edit Mode   (user must have "Edit" privileges. Must be active (red) in order to edit metdata)
    - Turn Edit On (Pencil turns red, allows metadata editing if allowed for that user)
    - Sequential File Rename (Batch rename files including sequential numbering)
    - Reserve ("Reserve" an item to prevent users from downloading temporarily)
    - Find & Replace (update metadata for select items for all or selected fields)
    - Edit Multiple (User may edit multiple items at once)
    - Edit Usage History
    - Add Text Record (for Text enabled systems)
- Version Control   (check out and check in version content (where configured)
    - Check Out (prevent non-admin users from accessing record while it is being worked on)
    - Check In (releases the item, also includes option to replace the item with a new version-keeping the old one)
    - Revert
    - Open Versions (If allowed, see all the earlier versions)
- Trax   (Where enabled, sends the user to today's requests in Trax—assignment request system)
- Show Linked Records   (show items that are linked together)
    - Display Linked
    - Link
    - Unlink
    - Remove All Links
- Compare (Compare selected items side-by-side)
- More Like this   (looks at metadata to show similar items, results displayed by relevance)
- Upload   (Use to upload content to Merlin)

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- o Download (to local computer, options include add a crop, set size, or convert
- o Export (Select one or more items and then "Export")
  - ▪ Email Link to file
  - ▪ Email Preview (contact sheet of displayed results)
  - ▪ Facebook
  - ▪ Twitter
  - ▪ YouTube
- o Print   (Print your search results)
- o Select All/None   (displays number of items selected, allows all results to be selected)
- o Sort order   (change the sort order of results-Use admin function to add additional sort criteria)

- o Gallery View
- o List View
- o Single View
- o Slide Show View

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Upload Content

Use the Upload button in the toolbar to open an upload dialog
Complete the fields for metadata (mandatory fields are marked with "*")
Either Drag files to the right side, or use the "+" button below to add files using the file browser

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Search Content

Basic Search dialog (includes buttons for content type)

Expanded Search Dialog
Use the disclosure triangle to toggle the state (open/closed)

Expanded Search Dialog with additional search fields exposed
Add additional fields by clicking the "+" button
Close fields by using the "-" button
Pick the field from the pick list

Expanded Search Options
Save Search options as reusable templates

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Download Content

Use the Download tool to download one or more items.
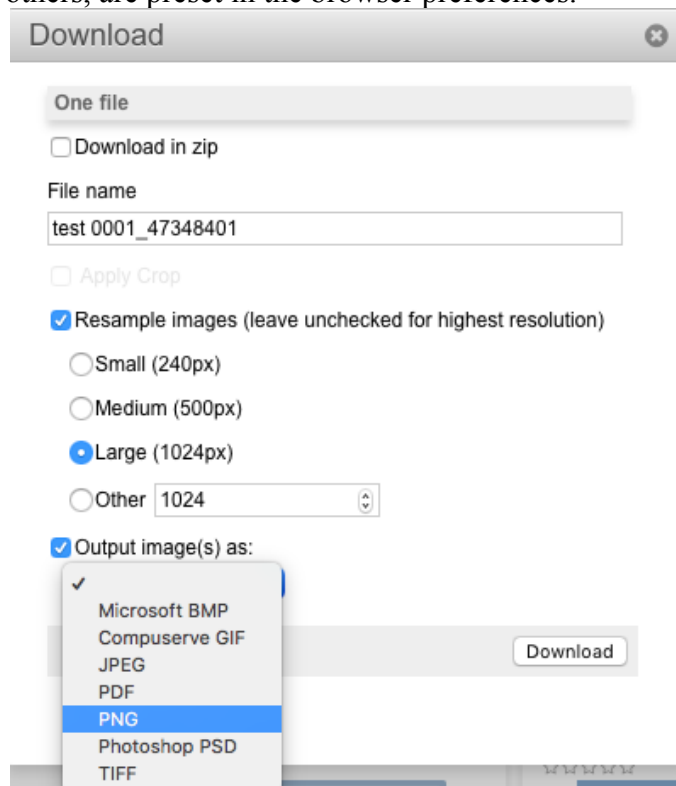Users will be presented with a dialog that allows for:

      Including a Crop
      JPG files may be resampled
      Files may be convert to other formats

Download location is determined by each browser type. Some browsers permit the selection of download destination at the time of download, others, are preset in the browser preferences.

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Share Content

Use the Share tool to download one or more items.

Users may be presented with a dialog that allows for (items may be disabled by Admin user):

    Email Link--send a link to an item via email

    Email Previews--send a contact sheet of selected items

    Facebook

    Twitter

    YouTube

Share

Email Link

Email Previews

Facebook

Twitter

YouTube

One file (delivered in zip)

File name

hostedadmin_20170214154529034.zip

To

Reply To

☐ Apply Crop

☐ Resample images (leave unchecked for highest resolution)
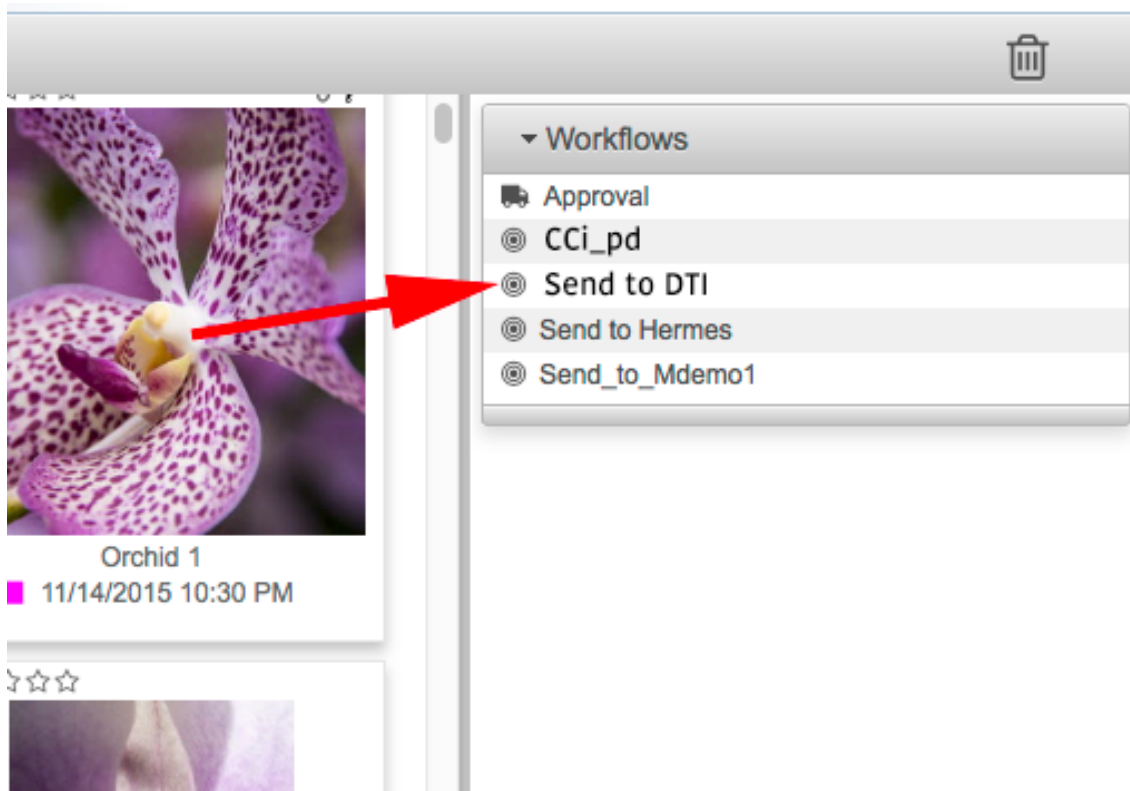
☐ Output image(s) as:

Send

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Export Content (to Production System

Ensure the "Workflow" palette is viewable
Select one or more items and drag to the appropriate workflow target.

Your Server/Workflow targets may be named differently, and you may not see the same targets as shown here.