



MerlinX User Guide

[Link](#) to MerlinX Quickstart

[Link](#) to MerlinX on-line

Tutorial

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What's New in MerlinX (6.1)

6.1 New Features

- [Hootsuite MerlinX Extension](#)
- [Simplified Search](#)
- [Collection Re-ordering](#)
- [Improved Link Sharing Copy Link](#) and [Share Assets](#)
- [Download Progress Indicator](#)
- [New redesigned Admin UI](#)
- Easier to navigate [Users and Groups](#) section of the Admin UI
- [New Report Builder](#)

6.0 New Features

- ☐ [Merlin University](#)
- ☐ [MerlinX Basic UI](#)
- ☐ Merlin^{AI} ([Facial Recognition](#) , Visual Similarity, Merlin IMPACT (Optional, separate product purchase))
- ☐ [Improved Password Functionality](#)
- ☐ [Improved Taxonomy Searching](#)
- ☐ Search for [Versioned Items](#)
- ☐ New Report for Versioned Items
- ☐ [Additional Version Options](#)
- ☐ [Share Collection folders](#)
- ☐ Collection Approval approves collection items
- ☐ [Identify IPTC/XMP fields in Fields Admin](#)
- ☐ Fields Admin now has left columns anchored for improved usability
- ☐ [Relabeled](#) "CanAccessClient" to reflect FTP function
- ☐ [Find & Replace Enhancements](#)
- ☐ Ability to generate a link for Email Preview without sending email
- ☐ [Notifications to content owners for download permission](#)
- ☐ New Login Page
- ☐ [Themes reduced to the three most used items](#)
- ☐ [Auto-update search results](#)
- ☐ [New Video Transcoding Options](#)
- ☐ [New Upload Options including file size minimums and maximums](#)
- ☐ Download batches as individual files, not just as a zip
- ☐ Search empty texts fields using the tilde (~)

5.6 New Features

- ☐ [Zoom in Single view](#)
- ☐ [Add history at the time of output](#)
- ☐ [Share private collections](#)
- ☐ [Save user defined crop templates](#)
- ☐ [Warning for large exports/downloads](#)
- ☐ [Order Form Available for mobile users](#)
- ☐ New Admin Modules for [Input Rules](#) and [Output History](#) and [MerlinX Info](#)
- ☐ [New Reports](#) (Comments and Group Entitlements)
- ☐ Sort by [comments](#)
- ☐ [Option to disable right mouse click](#)
- ☐ [Create date displays down to the second](#)
- ☐ [Share and Email Link forms now include Subject and Message area](#)

- ☐ [Copy Collection link to clipboard](#)
- ☐ [Option to download videos as original \(high resolution\) or proxy](#)
- ☐ [Improved file size Search](#)

5.5 New Features

- ☐ New Admin module to manage saved Merlin Alerts
- ☐ Comment emails sent to all users in Commenting thread
- ☐ Create new collection from the web upload form
- ☐ Dragging content to Collection Folder, creates new Collection
- ☐ User Group added to Login reports
- ☐ User report includes created and expires dates
- ☐ User remains logged in as long as browser is active
- ☐ Lots of UI adjustments to improve the interface
- ☐ Approval Workflow & Dashboard and associated entitlements
- ☐ Additional Display Options
- ☐ Thesaurus support for multi-word parents
- ☐ Merlin ID in metadata now acts as a link
- ☐ Update search results automatically if type buttons changed
- ☐ Ability to hide items in options area basic layout, personal search view, download manual, personal thumb size
- ☐ Removed upload file size limit
- ☐ New configurable login route to do a search on a single, specified field
- ☐ Mobile share and download included with MX Mobile platform
- ☐ Url routes added to mobile, links to collections, saved searches, cimageid now work in mobile

Merlin University

Merlin University allows users to learn about Merlin at their own pace and receive a certificate for successfully completing the course. Register for Merlin University at MerlinOne's website, www.merlinone.com, and click the MerlinU link. Many of the videos used in MerlinU may be accessed by following links contained within this manual.

Those links will be denoted with the video icon  .

MX Basic UI

MX Basic is an easy to use interface. It can be assigned to a specific user group as the primary interface or Merlin X users can toggle between both user experiences via the [options/setting](#) menu.

MX Basic is touch enabled and the default interface for mobile when using a tablet or cellphone. The MX Basic Mobile App is available in the Apple ios App store.

Access the [MX Basic User guide](#).

Logging In to MerlinX

MerlinX will work in most modern web browsers. Browsers that have been tested and are supported: Microsoft Edge, Firefox FF, Safari, and Chrome. Microsoft Internet Explorer is no longer supported.

Launch a web browser and point it to your Merlin system using the web address/ URL that has been provided.

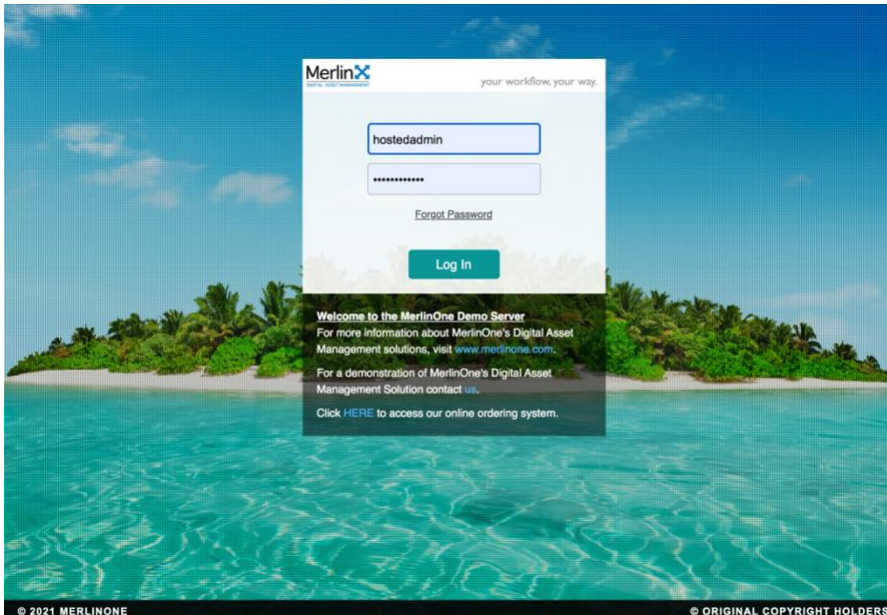
To login, enter your user name and password and click Log In or <ENTER> (<Return>).

Contact your administrator for username/password help.

Note: Single Sign-On (SAML) users may not see this login screen.

TIP: Use the “Tab” key to navigate from the UserID entry box to the Password data entry area. The “Enter” key is the same as clicking the “Log In” button.

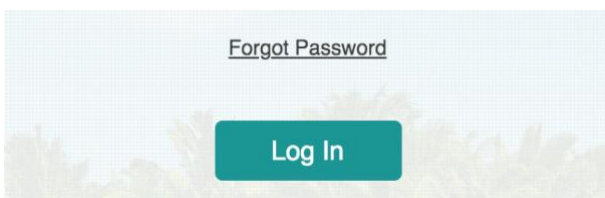
The new MerlinX login page may be configured to display four photos in rotation, a custom banner, custom text and copyright. An Admin using the Admin tools in MerlinX may set all of these. See the [Admin section](#) for more information on how to change the login page.



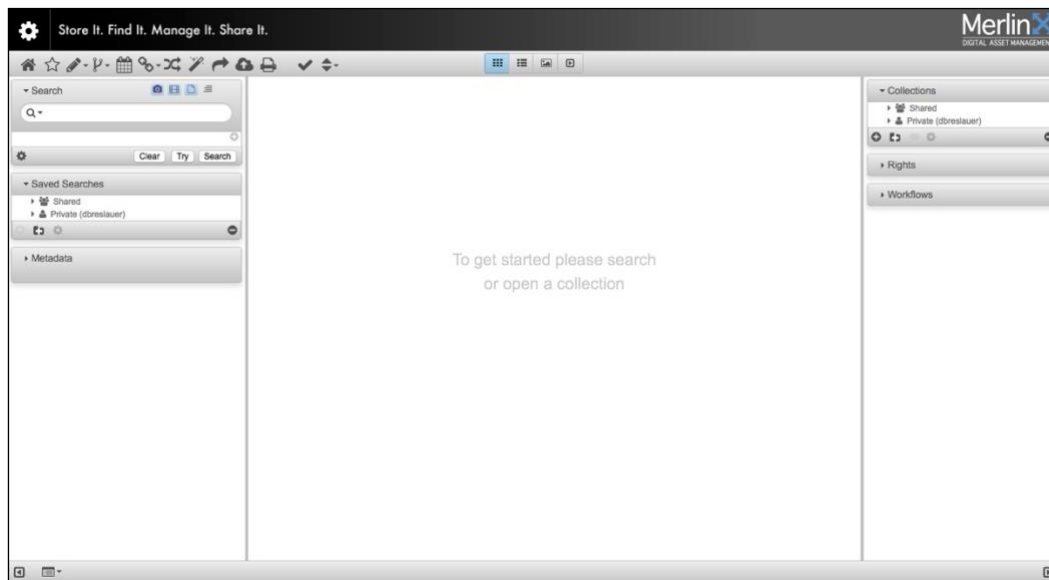
NOTE: SINGLE SIGN-ON SAML USERS MAY BYPASS THE DEFAULT LOGIN SCREEN.

Forgot Password Functionality

The login page includes a "forgot password" link. This resets the password and sends the user email with updated credentials. The User Manager in the administration area now includes a "[force password change](#)" option. If a user's password has expired and they have permission to reset their password, the user will be presented with the opportunity to reset it, otherwise they will be presented with a "growl" *"Password for this userID has expired. UserID does not have permission to change password. Please contact admin for assistance."*



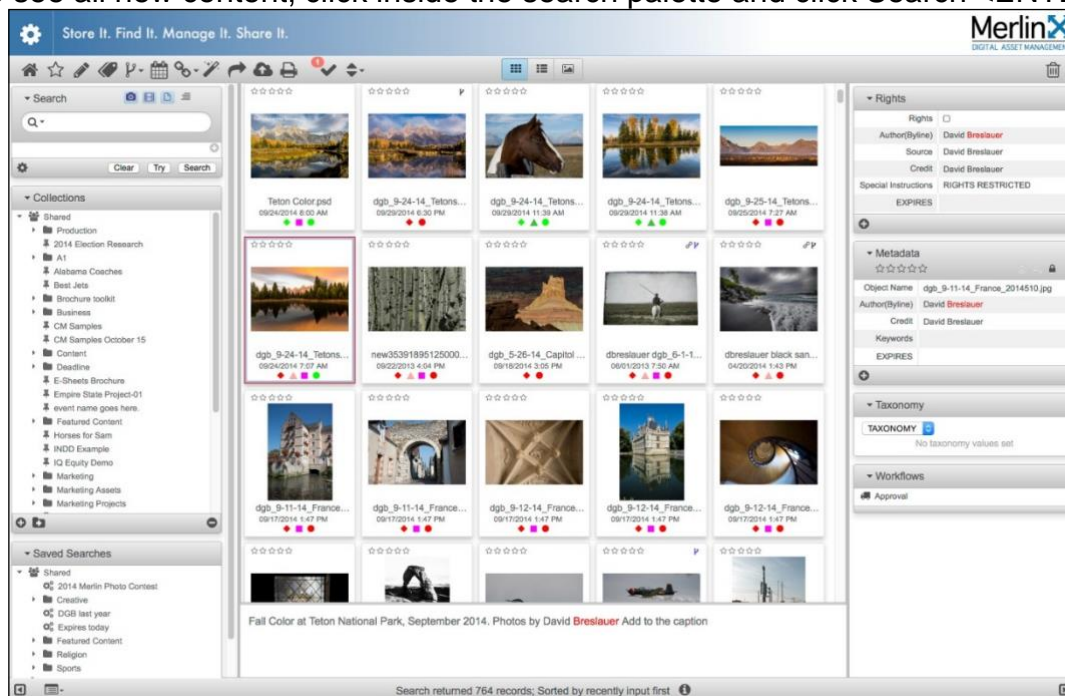
Default View



Depending upon configuration, MerlinX may open without displaying content by default. It is possible to create a default login search, go [here](#) to learn more.

To get started and see content, run any search (from the search palette), run a saved search (from the Saved Search palette), or open a collection.

To see all new content, click inside the search palette and click Search <ENTER>.

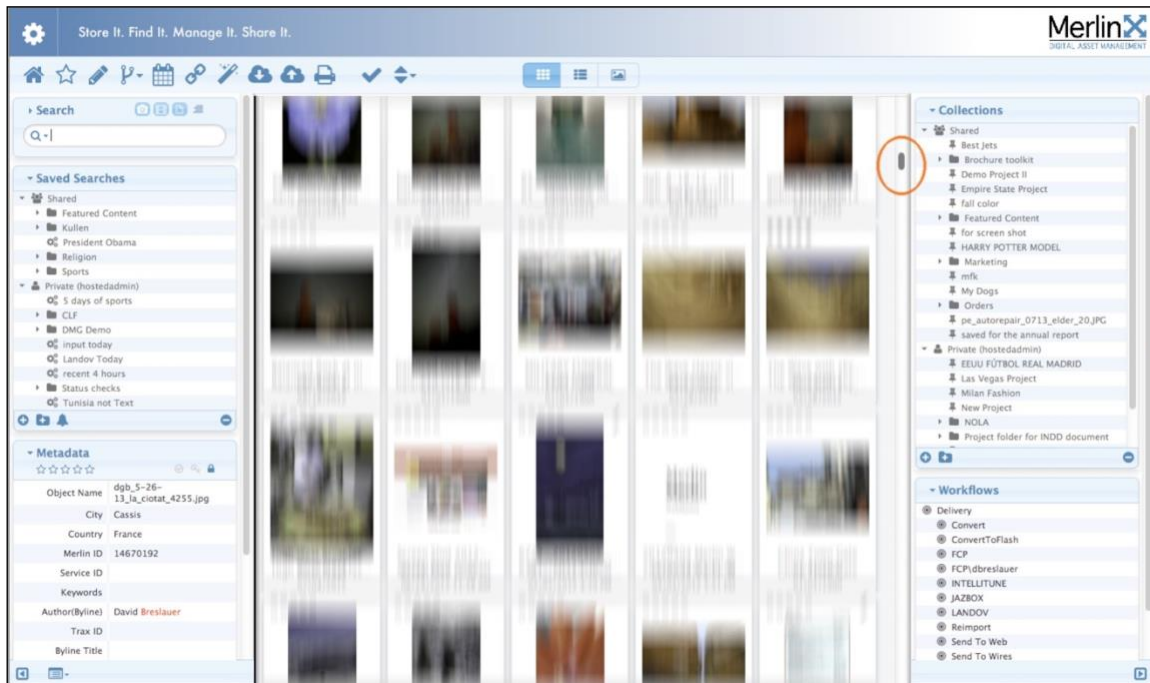


Once a user has run a search or opened a collection, content appears. The default view at login is the grid thumbnail view. The default view is configurable using either the [admin display](#) or user [options](#).

MerlinX Navigation

MerlinX content is easily navigated using normal web practices. Use keyboard commands like page up, page down, or the keyboard arrow keys to navigate the content set.

Use the scroll bar to the right of content to move through the results set. Even the scroll wheel on so equipped mice may be used.



Drag the thumb in the scroll bar, use page up/down and arrow keys, or use the mouse scroll wheel to navigate through the results set.

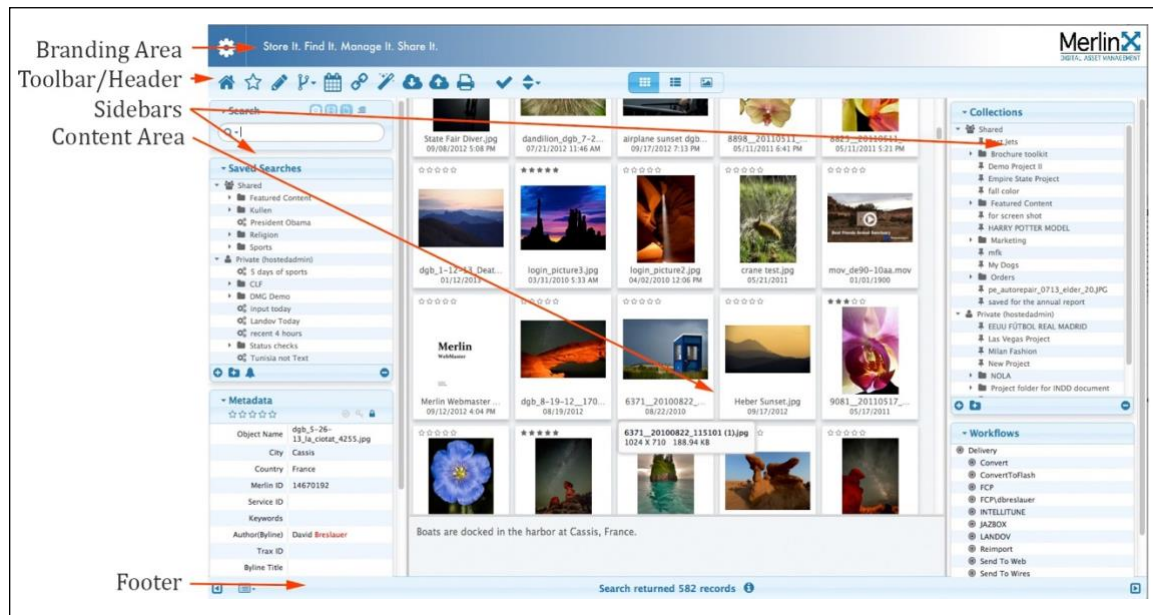
TIP: The “Home” key will go to the top of the results set, “End” to the bottom. Use “Page Up” and “Page Down” keys to navigate a screen’s worth of results at a time.

TIP: Use the Merlin navigation tools and **not** your browser back/forward button for best results.

Setting Up MerlinX

The MerlinX screen is divided into three principal areas. They are:

- The **Main Content area**, where results are displayed either in a gallery grid view, a list view, a single view, or SlideShow view.
- The **Sidebar panes**, where movable palettes appear
- The **Header & Footer areas**. The main toolbar appears in the header area, and some display tools and information appear in the footer area



Other parts of the screen include the **Branding area** at the top. MerlinOne Customer Service may configure this.

Tools included in the **Toolbar** may vary depending upon local configuration and user's entitlements or permissions.

The admin tools are accessible from the **Options** area within Branding.

The **Sidebar**s may be opened or closed independently. **Palettes** within the sidebars may be moved using drag & drop either within a side bar or from one sidebar to another. Palettes may be hidden/shown using the tool in the footer area and may be closed minimized or opened maximized using the disclosure triangle inside the palette.

The content area may be a grid view, a list view, single view, or a slideshow view as selected in the **Toolbar**.

The **Footer** contains controls to open and close the sidebars, or show hidden palettes. Also, the search help within the footer will display the current search terms in use.

Workspace Management

The browser window may be resized to fit any screen. It will resize elements as needed. Use standard browser protocols to manage this.

A user may arrange their workspace to their individual preference. Preferences are remembered from session to session. Palettes may be hidden, shown, moved or expanded. Use the disclosure triangle next to the palette title to expand the palette contents. Use the “X” to close the palette. The “X” shows up when the mouse rolls over the palette. These settings are now stored in the database as a preference and will be applied to any browser or on any computer for a given user/group/default, depending on how the settings are saved.

Default View

A user with access to both the MerlinX and the Merlin MX Basic UI may select “Merlin MX Basic” view from the Options area once logged in. If a user is configured to log into MX Basic via a user group setting, they will ALWAYS be logged into MX Basic unless that user group is removed from their groups or the setting is changed for that group. Otherwise, if they switch from default to basic, and log out from basic, they'll be logged into Basic next time. [See the section on MerlinX Basic.](#)

Palettes

Merlin uses a number of palettes to arrange information in a logical fashion. Currently the palettes are:

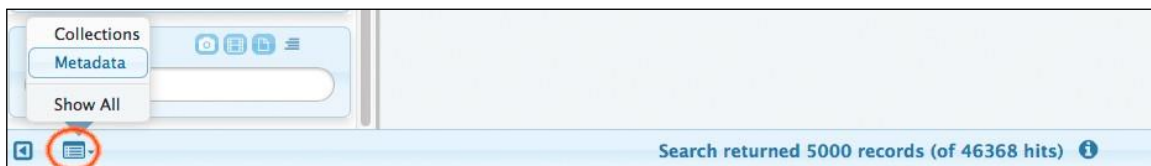
1. **Search** includes simple and advanced searching options
2. **Saved Searches** includes both private and shared searches
3. **Collections** includes both private and shared collections
4. **Metadata** includes all metadata as allowed by configuration
5. **Rights** contains a specifically defined set of metadata fields as allowed
6. **Taxonomy** Displays specific taxonomic values
7. **Workflow** includes both output server targets and defined workflows

Hide palette content or palettes



Use the disclosure triangle left of the label to show or hide palette content. Use the X which appears on mouse-over to hide the entire palette.

Showing/Revealing Palettes

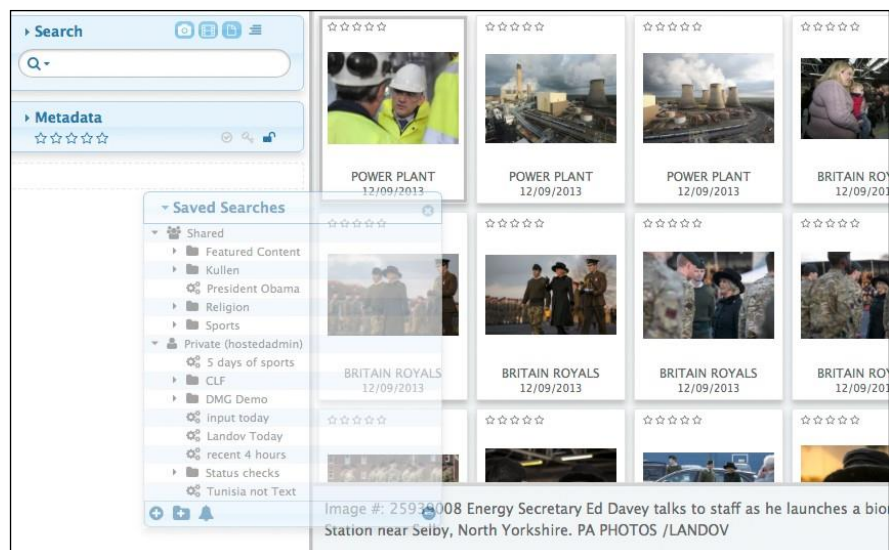


Use the Show “Palettes” feature, found lower left in the footer, to reveal hidden palettes.

The open “Palettes” disclosure reveals two palettes that are currently hidden in this example.

Select “Show All” to show all hidden palettes or select an individual palette to restore just the one.

Dragging Palettes



Palettes may be moved to any position in either Sidebar with a simple mouse click and drag of the palette.

Showing/Hiding Palette Sidebars



The Footer contains a control to show/hide the sidebars that appear to the left and right of the main content area. Users may hide these columns. The tool indicates a reversed direction when columns are hidden.

Right Mouse Click

The Right Mouse Click option, a browser option which allows the saving of images, may be disabled. This is to discourage people from saving displayed thumbnails to their local computer. It will not prevent screen shots. This is configurable by MerlinOne customer service. Contact customer service to have this feature enabled/disabled.

Switching User Modes

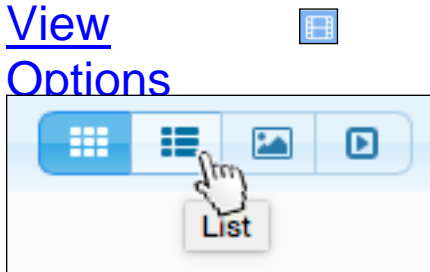
MerlinX 6.0 allows a user to switch from the configured view to a more simple view with a reduced tool set, fewer palettes and a streamlined UI.

Select "Switch to MX Basic..." from the "Options" menu. This will change the user interface (UI) to a streamlined, reduced toolset. The MerlinX Basic UI is also the default view for mobile users and for many integrations.

Some users will default to MX Basic and will not have the option to choose. This is set by the Merlin Admin.

Switch to MX Basic...
Administration...
Change Password...
Edit Profile...
Set Personal Grid Thumb Size...
Set Personal Login View...
Set Personal Search View...
Set Theme...
See Notifications...
Download Manual...
Log Out (dbreslauer)...

View Options

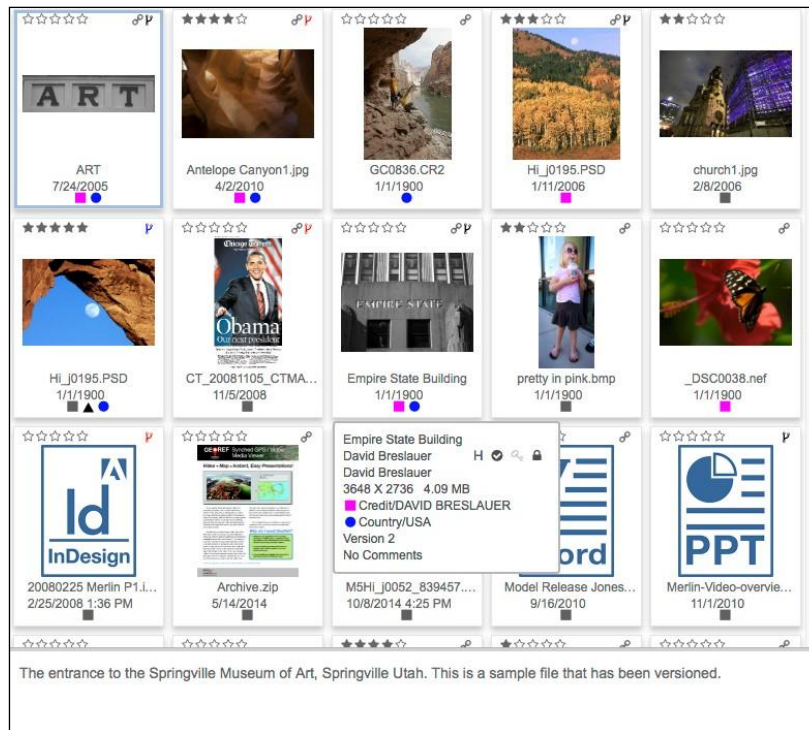


Currently, users may select one of four different view options, Gallery view, which is the default login view, List view, Single view or SlideShow view. These may be selected by using the tool in the toolbar area.

A tool tip describes the view when the mouse hovers over the tool.

Additionally, double clicking in the content area will change the view. Users may go from Grid or List view to Single (and back). Double clicking does not apply to Slideshow view.

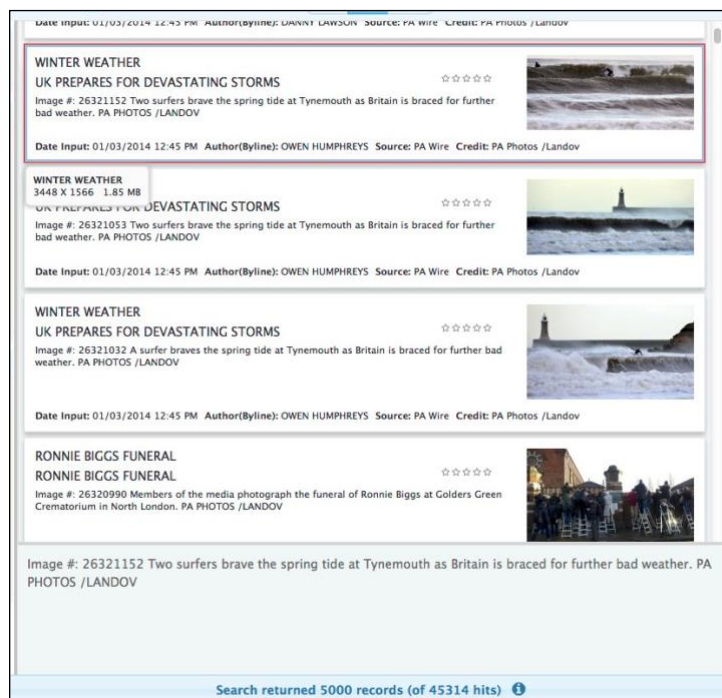
Gallery View or Grid



Content thumbnails may be displayed with star rating, color codes and the date. Other badges may indicate the item's version, link status, or custom badges assigned to a specific field. Rolling over each thumbnail with the mouse reveals additional hover information. Note the color codes/shapes that appear beneath some of the thumbnail views. These color codes provide "at-a-glance" information.

Fields, Badges and color codes displayed in gallery are configurable and may be different than shown.

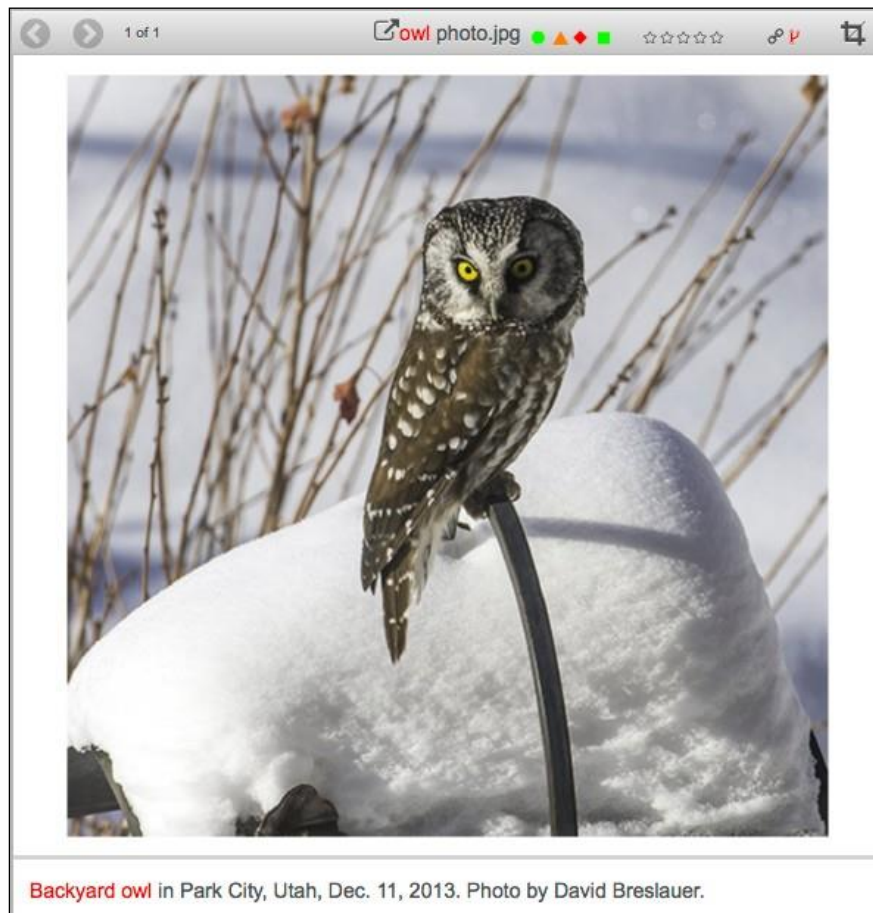
List View



List view shows the small thumbnail with the Object Name (file name), Headline and the description. Other Metadata like the Date Input and the Creator are listed below.

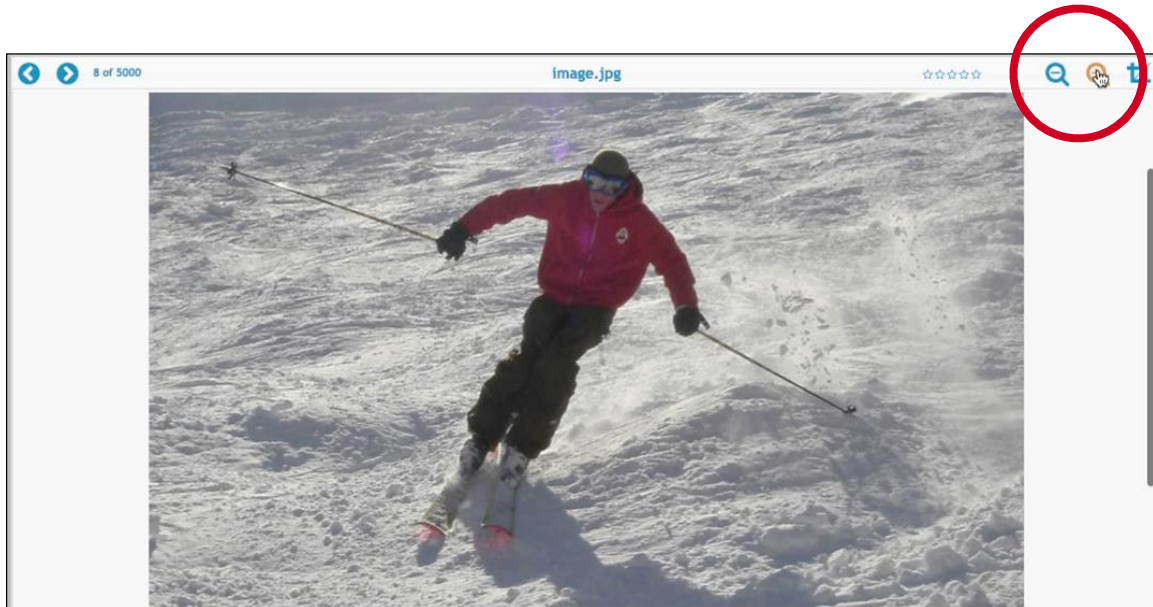
Single View or one-up

Note the direction tools to go to the previous or next item, the item's file or object name, color codes, star ratings, version status, crop tool, and the caption/description are displayed in this example.



Zoom In

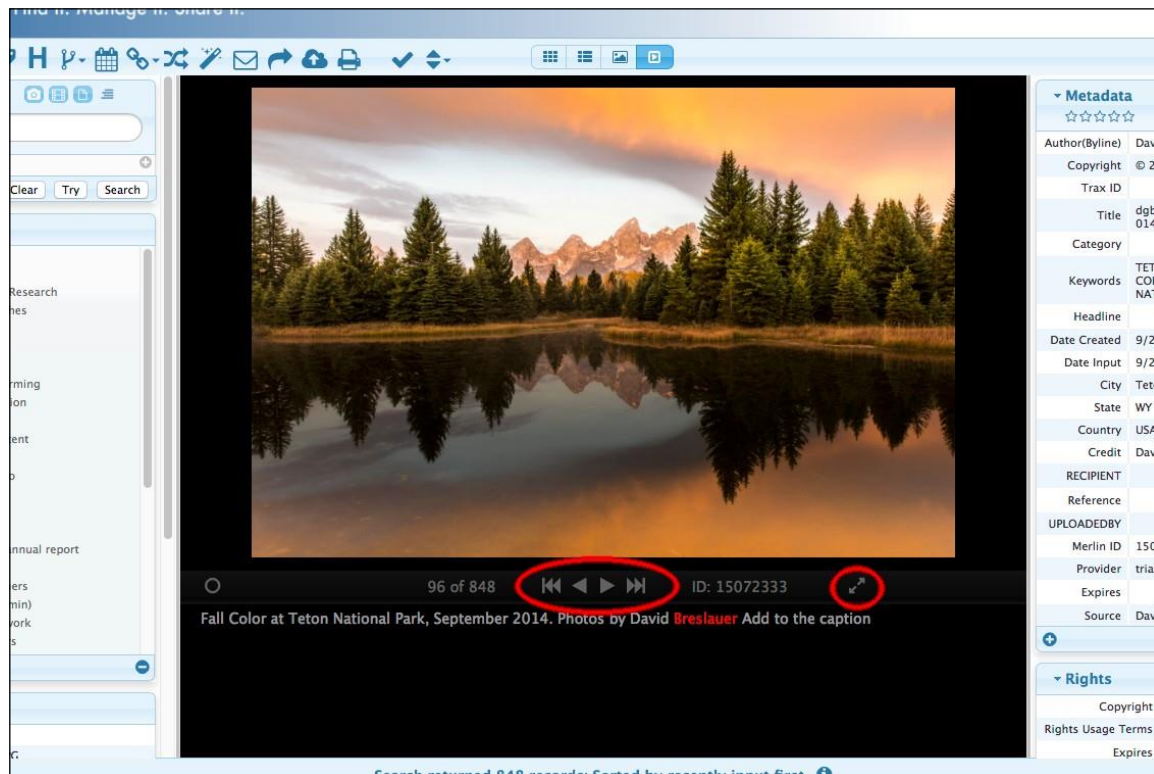
When in single view (1 up), take advantage of the zoom tool to zoom in on your content. The zoom is using the large preview stored in Merlin. This is typically 1024 pixels for the longest dimension.



Each time the “+” button is pressed, the item will zoom in and will stay centered. Once zoomed in, it is possible to move the image around the sliders below and to the right side, or use the scroll button, track pad to move the image around.

SlideShow View

The SlideShow view is a special Single View display. It surrounds the selected content with a black frame and includes tools to view selected items in a full-screen slide show.



Use the on screen controls to navigate through the selected items Back to the

Beginning, Previous, Next, Advance to the End, and to go to Full-Screen mode and back.



Use the “tag” area on the left of the

controller to untag items so they are no longer part of your selection. Unchecking will remove from the selection.

TIP: Use the “ESC” key to leave full screen mode.

On Screen Information Color Codes & Badges

The thumbnail view conveys a lot of information both textual and visual.

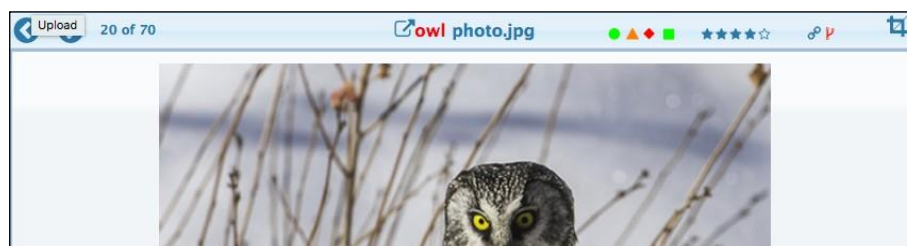
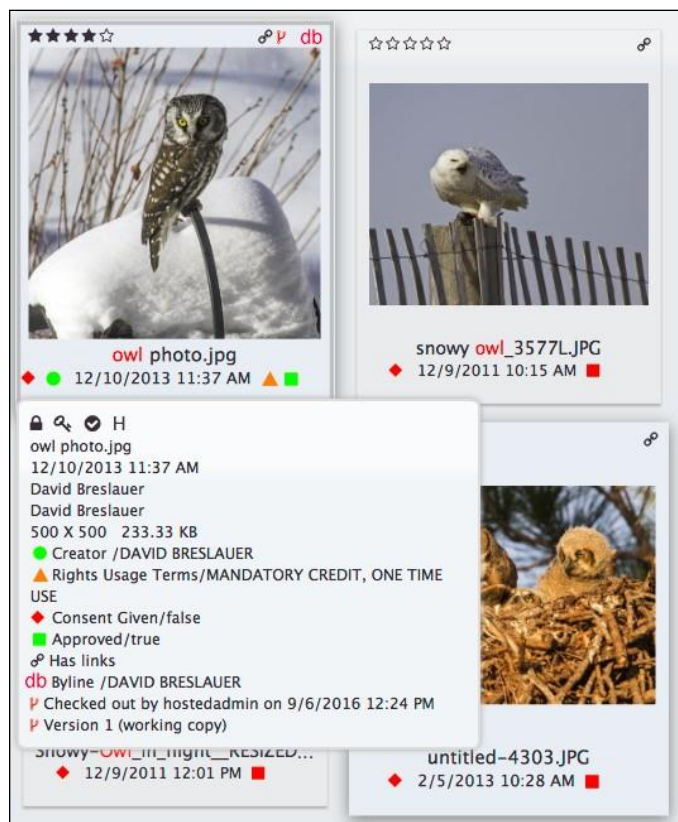
In the gallery and list views, a blue box around the item indicates it is the targeted item. Other selected items are denoted with a drop shadow around the image box and a slightly raised appearance. The star rating may be visible at the top of the item along with icons indicating an item is checked out (version control) in addition to the link icon. "Badges" may appear as well (db). The colored shapes at the

bottom are metadata "at-a-glance;" the shapes and colors are keyed to specific fields and metadata values. In this example, Circle=Creator, Green Circle=David Breslauer. Badges are also field specific.

Upon rollover hover, a legend appears that provides additional information about the badges, color codes, metadata, and icons.

History, Checked, Rights, and Protected icons appear to indicate the status of these fields.

Badges and Color Codes may be configured by an admin user.
























In the single view, similar information is displayed in the title bar, along with navigation tools.

Overview of Primary Merlin Tools



The Main Merlin Toolbar near the top of the screen represents the tools accessible by users. Note that not all tools may be enabled or accessible. They will either not be shown or they will be “grayed out” if unavailable. Note that some tools have “options” that are accessed by clicking on the tool to reveal a sub menu.

HOME Use at any time to return to initial logged in view.	
Dashboard View items in your dashboard approval status.	
View Featured Content It will not appear unless Featured Content has been configured.	
Edit Mode Edit Choices include turning on single item edit privilege tool turns red. Edit Multiple Items, Find and Replace, Sequential File Rename, Reserve, Add Usage History or Add New Text Record.	
Version Control Check out/check in/replace versions. It will not appear if Version Control is not installed.	
Link to Trax Open today’s assignments in Trax, where Trax is configured. Will not appear at non-Trax enabled sites.	
Linked Items Items may be linked at import or by a privileged user. Use this tool to view or link items.	
Similar Images (Option-Only appears on Merlin ^{AI} Visual Similarity sites) Uses pattern matching to find exact duplicates, near duplicates and similar content.	
Compare Compare selected items in a new window.	

<p>More Like This</p> <p>Show more like the selected item based on metadata and results ranked by relevance.</p>	
<p>Upload</p> <p>Upload items if the user has upload permission.</p>	
<p>Download</p> <p>Download items directly to your local computer. if the user has the permission.</p>	
<p>Share items</p> <p>Share items if the user has download permission.</p> <p>Allows users to download or share content for use in other documents/ applications or locations. It links to an export options page. Includes sending to social media sites.</p>	
<p>Order (not shown in above image)</p> <p>This option replaces “Share” and “Download” on systems where the ordering system has been configured. Click the Order button to create an order for one or more items.</p>	
<p>Print</p> <p>Print a version of current view, hiding sidebars, header, footer, etc. If the view is “Grid,” the print results will be a grid, if in “Single View,” the results will be one item per page.</p>	
<p>Selection Tool</p> <p>Shows number of items selected. Use it to Select All. This is a toggle. NOTE: the expected keyboard command to Select All does not apply.</p>	
<p>Sort Order</p> <p>Change results sort order.</p> <p>For Merlin^{AI} systems using Merlin IMPACT, select that function here.</p>	
<p>Grid view</p> <p>View items arranged by rows and columns.</p>	
<p>List view</p>	
<p>Single view</p> <p>Show one item at a time.</p>	
<p>Slideshow view</p> <p>Show one item at a time, with black background and option to fill screen.</p>	

Delete Items

Users with delete privileges may drag content to the trashcan. Content sent to the trash may be retrieved for 7 days (default setting). Use Search Trash to find deleted items and restore them by dragging to “recycle” trash can.

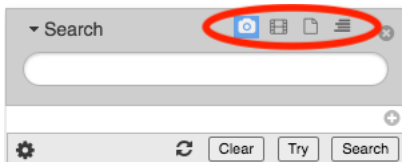


Searching

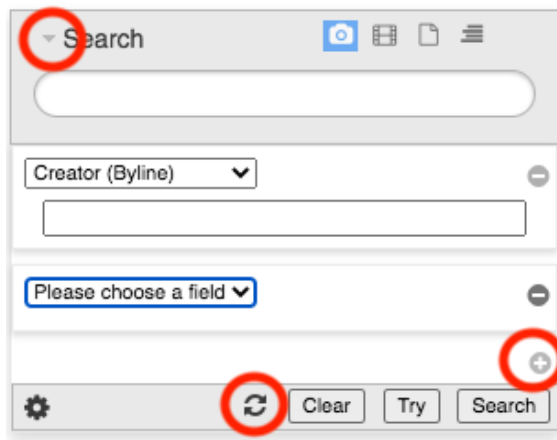
Searching may be done in the simple search window or by creating a more complex search area by using dropdown for specific fields. Use wildcards, Boolean operators, and date/time ranges to narrow the results. See the [Search Tips](#) for more information.

Basic Searching

Basic search palette; the icons indicate document types: photos, audio/video, other or structured text. They are toggles. Dark highlights indicate the items are selected.



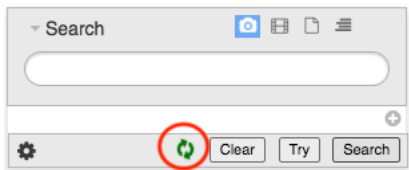
The search palette expands to show ability to add field level search options. These include text fields, date fields logical True/False fields, versioned items, and file extensions. Use the “+” button to add more terms. Use “-” to remove them.



Autoupdate tool

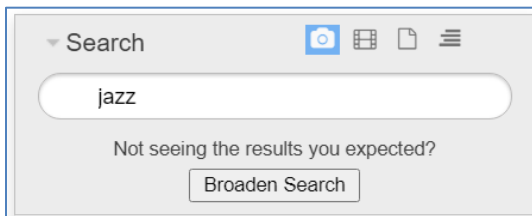
Auto-Update Search Results

Have search results auto refresh by enabling auto update. Click the auto-update icon in the search toolbar. It turns green and spins when active. When active, the search results are refreshed. The default refresh period is 30 seconds. This may be adjusted in the “Advanced Prefs” by MerlinOne staff. The minimum is 15 seconds; there is no maximum



Broaden/Narrow

After performing a search with more than one search word, a search filtering button will appear beneath the search box to either “Broaden Search” or “Narrow Search”. This will remain sticky as you use it. If the search is too limiting, click the button to Broaden the results and include similar records that might not be an exact match to the initial search query. If the search is too broad or returned more records than you’d like to review, click the button to Narrow the search result.



Thesaurus

By default a thesaurus is used when searching. The Thesaurus is created and managed in the MerlinX admin area.

Word Root Search

By default word root search is enabled. For example, checking the box and searching for “running” will also search for run, runs, and ran.

Singular and Plural

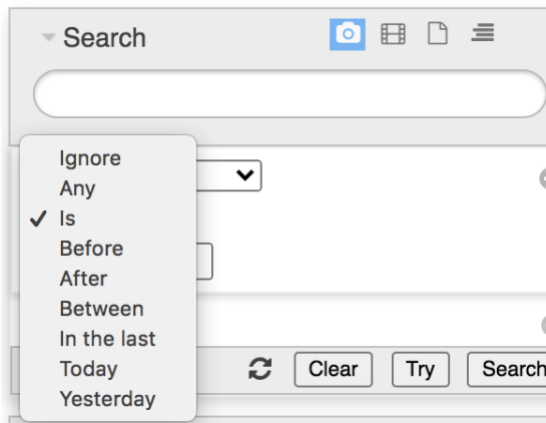
By default, Merlin searches for singular and plural unless otherwise specified.

To limit search results, follow the search term with “/”.

For example *run/* searches for only singular “run” and searching for *runs/* results in only plural “runs”. So, there is no reason, for example, to include both singular and plural versions of keywords. Merlin can manage that for you easily.

Search Options

Date Search Options

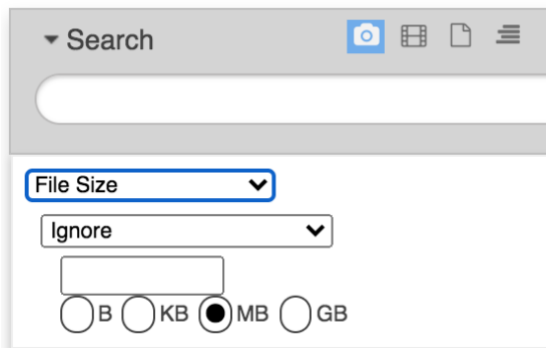


Date fields allow the option to:

- ☐ Ignore the Date
- ☐ There is a date in that field
- ☐ There is no date in that field
- ☐ Is a specific date
- ☐ Before a specific date
- ☐ After a specific date
- ☐ Between dates
- ☐ In the last hours, days, months or years depending upon the date field
- ☐ Today
- ☐ Yesterday
- ☐ And in some date searches, Never
- ☐ Create date now displays seconds (v 5.6)

File Size Searching

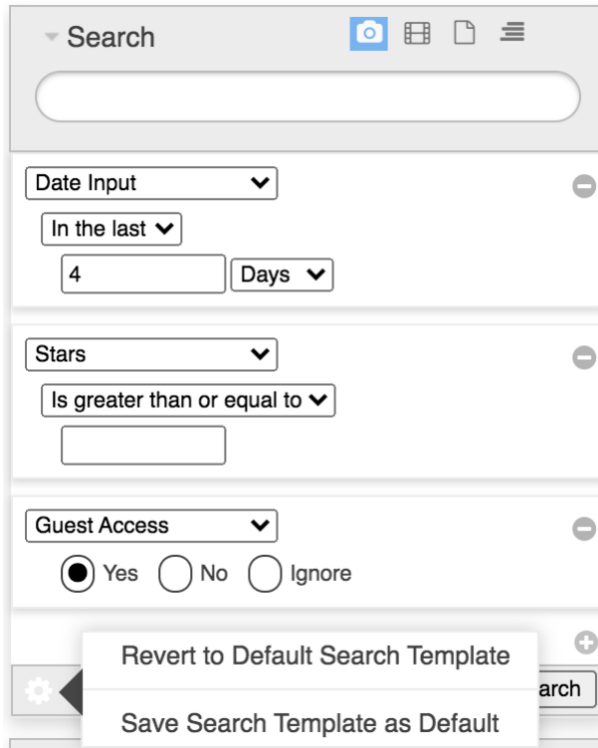
Select File Size from the pulldown.



Choose the option less than or greater than from the picklist.

Use the radio button to select Bytes, Kilobytes, Megabytes or Gigabytes.

Other Search Field Types and Options



The screenshot shows a search interface with a title bar 'Search' and icons for camera, film, document, and menu. Below the title bar is a search input field. The main area contains three search criteria sections, each with a minus icon on the right:

- Date Input**: A dropdown menu showing 'Date Input', followed by 'In the last' and a dropdown, then a text input with '4' and a 'Days' dropdown.
- Stars**: A dropdown menu showing 'Stars', followed by 'Is greater than or equal to' and a dropdown, then a text input.
- Guest Access**: A dropdown menu showing 'Guest Access', followed by three radio buttons labeled 'Yes', 'No', and 'Ignore'.

At the bottom left, there is a gear icon and a button labeled 'Revert to Default Search Template'. To its right is a button labeled 'Save Search Template as Default'. On the far right, there is a plus icon and a button labeled 'Search'.

This shows an expanded search window.
Boolean Terms: and, or, not, near, like, then, at least

Use the “+” or “-” to add or subtract field searching options

Options supported: datatypes
fulltext, date fields, numeric fields, logical fields

The tool option, lower left, allows for search defaults to be saved

Advanced Searching

The advanced options within the search box to change the search mode from Boolean to other types, and to include thesaurus or word root searching are now removed. The search itself will perform these actions internally and automatically, producing a higher quality search result with less user effort.

Boolean Searching

The default search mode is Boolean. Users may include Boolean operators in their searches.

Boolean operators include:

and	AND is the presumed operator. It is used even if it is not specified. It combines search criteria to narrow down a search. Example: <i>This AND that</i>
or	OR broadens the search. Merlin evaluates the OR clause first, regardless of its placement in the string, unless parentheses are used. Or may be used in both full text and field specific for advanced searches. Example: <i>This OR that</i>

not	NOT excludes records with the specified criteria and may be used in both full text or IPTC fields for advanced searches. Example: <i>This NOT that</i>
like	LIKE is the fuzzy or "sounds like" operator. Examples: <i>like this</i> , or <i>like 10 this</i>
near	NEAR is used to search for words that appear within a given proximity. The default threshold is eight words, however a numeric operator may be applied to narrow or broaden the proximity. Examples: <i>This near that</i> , or <i>This near 7 that</i>
then	THEN is the ordered search operator. Words appear in a particular order. Example: <i>This THEN that</i>
atleast	ATLEAST is used to only show objects where the search term appears at least a specified number of times Example: <i>Atleast 3 this</i>
“”	Use quote marks to denote an exact phrase to be searched Examples: <i>“Little Rock”</i> , or <i>“affordable care act”</i>

Search terms may be combined and organized using parentheses.

(Susan or Sarah) Jones not Sally

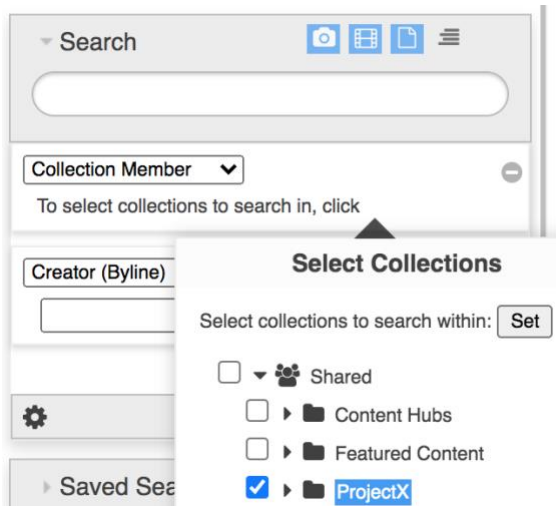
President near 2 Obama

((susan or sarah) jones not sally) and (President near 2 Obama) not “affordable care act”

[See the appendix for Merlin Search Tips.](#)

Other Search Options

Searching Collections



Search within a collection by adding “Collection Member” to the list of search options.

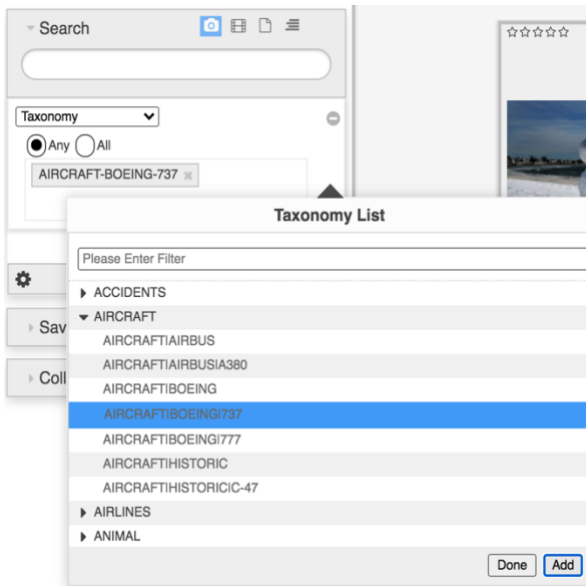
Select one or more collections to restrict searches to the selected collections.

This would be considered searching within a collection.

Taxonomy Searching

In addition to Picklist fields, which may allow multiple values, and/or enforced lists, Merlin has two multi-level, hierarchical taxonomy fields. By default they are labeled “Taxonomy,” which is 10 levels deep, and “Person,” which is two levels deep.

DON'T CONFUSE PERSON (TAXONOMY FIELD) WITH PERSONS (IPTC/XMP FIELD)



Select either “Taxonomy” or “Person” from the Advanced Search Picklists.

Click the pencil tool to add values to the search for the list.

Start to type and you will be taken to that portion of your taxonomy list.

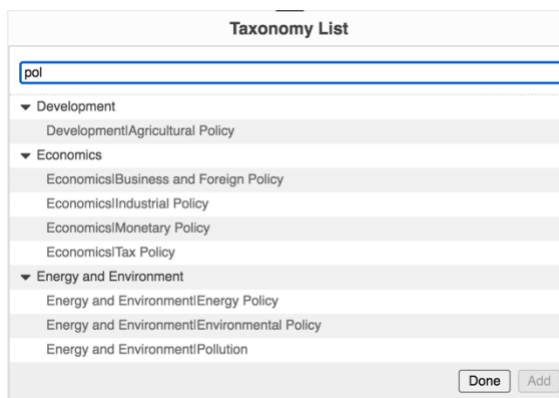
Use the + and – buttons at the lower left of the Taxonomy editor to add or remove taxonomic values.

Select the “ANY” or “All” option to determine how the search is handled for values within the field.

AND is the operator when different fields are displayed.

To hide, or not use one of the Taxonomy fields, use the “minus” button to remove it from the search options.

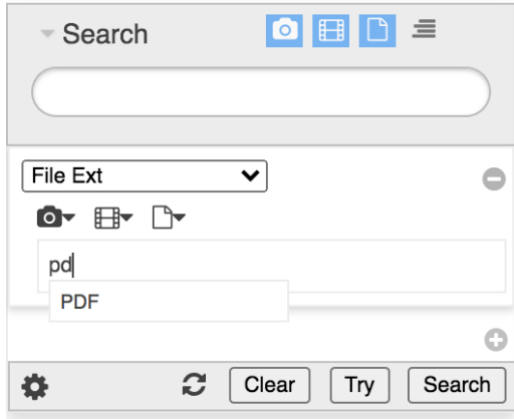
Search on any level of taxonomy



In our example, the user has started to enter “pol” and the filtered results show the word Policy and Pollution found in secondary position.

File Extension Searching

In addition to using Merlin's Search filter for Photos, Audio/Video, Other and Stories where enabled, users may search for specific content based on file extensions.

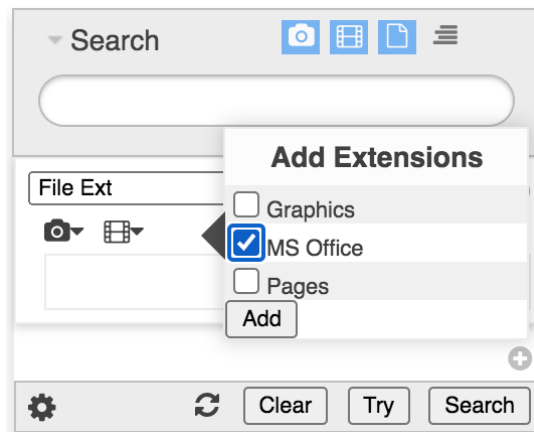


Select File Ext from and Advanced Search Picklist.

Start to type the file extension and pick from the list of extensions that currently exist in the database.

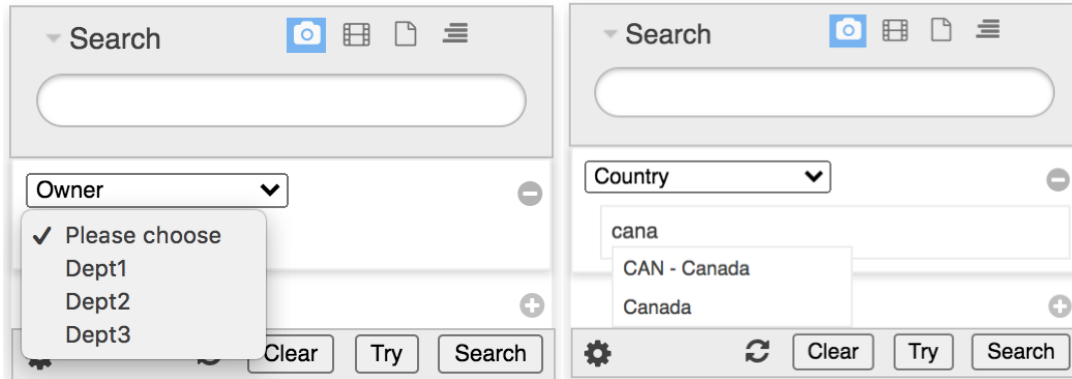
For a “Quick Select” for all photo file types, or all video file types, click the respective icon.

To add an additional file type to the quick select, click the disclosure triangle to the right of the icon and add additional file types to the quick selection tool.



Using Picklists

When configured, users may select from Picklist values to search specific fields. Some fields may use enforced Picklists, others may allow free text entry, and some fields may allow for multiple values to be selected.



On the left, a multi value Picklist is displayed. Start to type and potential values appear. On the right, a single value Picklist is shown.

In cases where a single value picklist contains more than 50 values, it will behave like a type-ahead list, but will only allow a single selection to be made

Saving Searches

One of the benefits of Merlin is that it allows users to save often-used searches. These searches may be created in either the rich client or the web client. These searches may also be “private” belonging to the logged in individual, or they may be “shared” with other users. Searches created in the MerlinX web client will be available to users in the M5 Rich Client, and vice versa.

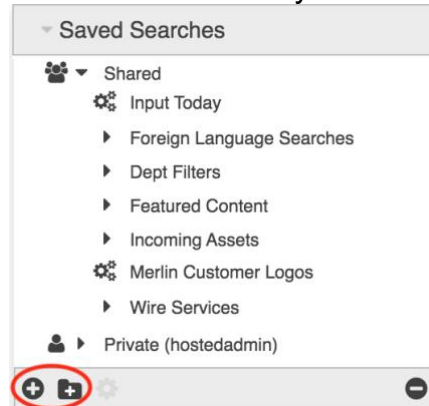
Note, saved searches from Merlin Webmaster will not appear in MerlinX



To create a saved search, follow these steps:
Create or build a search in the search palette
Run the search to verifies that it works as expected

Determine if the Search is to be Private or Shared. Then select either "Shared" or "Private", or a subfolder of either, and use the round "+" button at the bottom-left of the Saved Searches palette to add the new saved search.

The new saved search or folder is initially labeled "untitled". Rename the search.



Use the "Folder +" option to add folders to Shared or Private searches to organize content. Use the disclosure triangles to open or close folders.

Using Saved Searches

To view the results of a saved search, double click on the named saved search.

TIP: There are special types of saved searches.

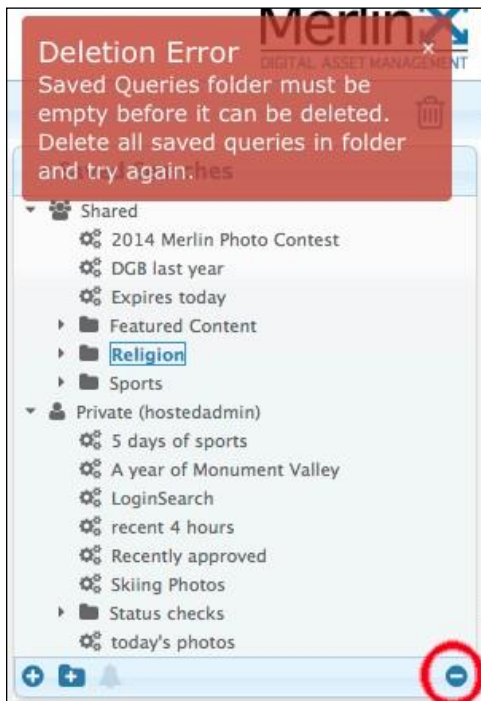
Saving a search as the "LoginSearch" will cause it's results to be shown if "Saved Search" is selected as the login view in the admin area. In this case results will be triggered when the home button is clicked. This may be a private or shared saved search.

Searches in a shared saved search folder called "Featured Content" will be used in the Featured Content area.

Deleting Saved Searches

Select the Search to be removed

Use the “-” button, bottom right of the Search palette. Not all users will have permission to remove saved searches.



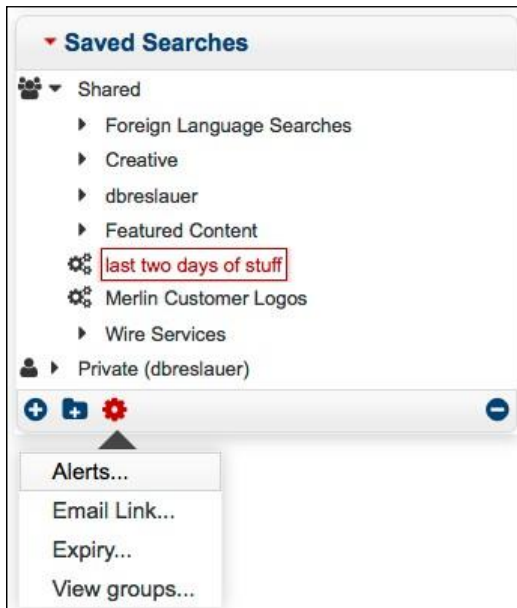
The “minus” sign removes Searches and/or search folders. A warning appears if a user tries to remove a search folder that is not empty. First remove or relocate items within a folder, then delete the folder.

More Saved Search Options

Trigger email alerts, email a link to a search to users with credentials, expire a search, or change group permissions as an admin user. Select these options from the Saved Search Tools the cog icon in the bottom of the Saved Search palette.



Merlin Alerter



Merlin Alerter is a special type of saved search. Configuring a search with Merlin Alerter triggers email with search results. Adding one or more email addresses to an “Alert” will cause Merlin to automatically send an alert to the addressees any time new content arrives that meets the search criteria. Settings on the Merlin server determine how many times an hour and day an alert should be sent.

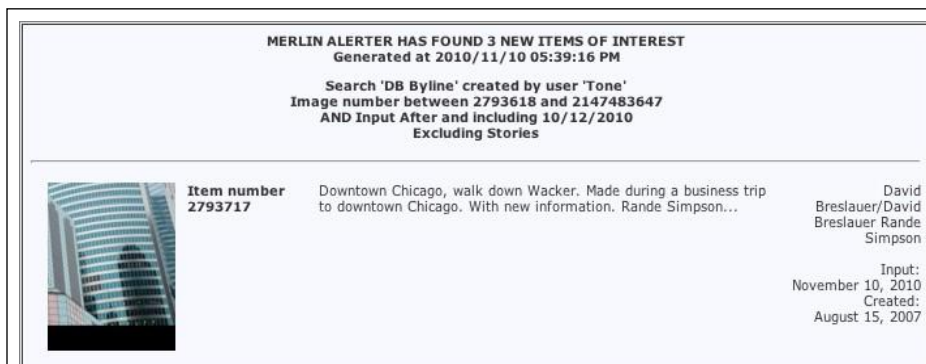
To create an “Alert” first select the search, then select the “Alerts” option from the "Saved Search Utilities" at the bottom of the Saved Searches palette.



Enter in one or more email addresses and then Save Changes.

An Admin user may view all alerts and delete any, as required. See the [Admin](#) section of this manual.

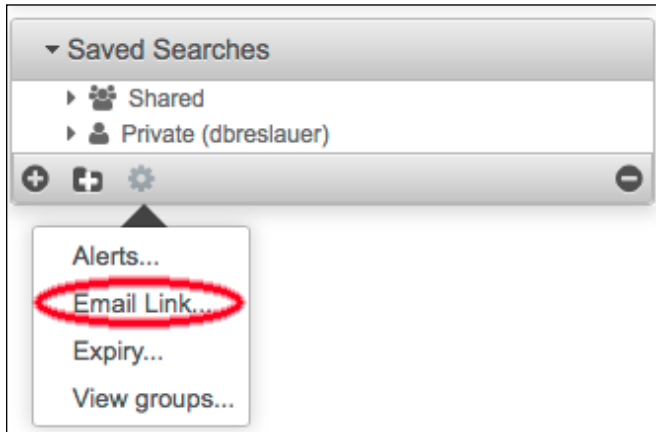
An example of a Merlin Alerter email. Clicking in the Alert on the thumbnail area will take the user to the Merlin Login Screen, and then to the search



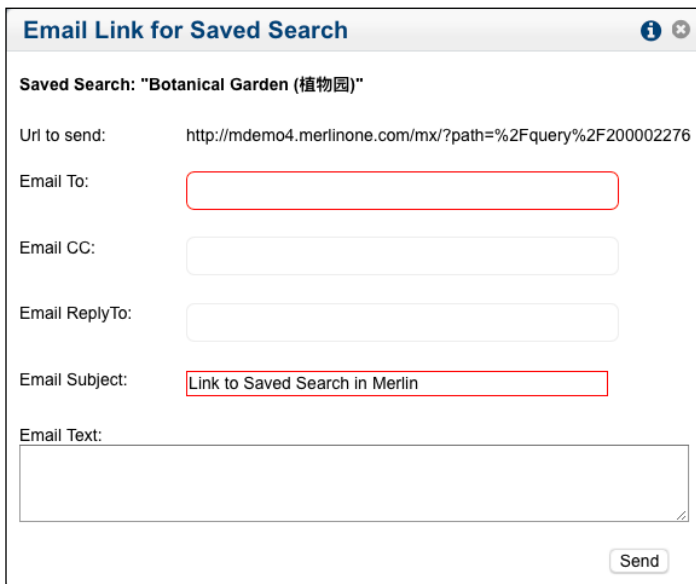
results.

Sharing Search Results

Select the Email Link option in the Saved Search Utilities to send a link to another user that is allowed to login to MerlinX.



Then complete the form.

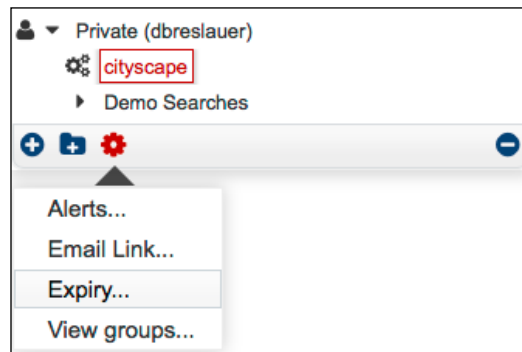
A screenshot of a web form titled "Email Link for Saved Search". The form has a header bar with an information icon and a close icon. Below the header, it says "Saved Search: 'Botanical Garden (植物园)'" in bold. The form contains several fields: "Url to send:" with a pre-filled URL "http://mdemo4.merlinone.com/mx/?path=%2Fquery%2F200002276"; "Email To:" with an empty text box; "Email CC:" with an empty text box; "Email ReplyTo:" with an empty text box; "Email Subject:" with a pre-filled subject "Link to Saved Search in Merlin"; and "Email Text:" with a large empty text area. At the bottom right of the form is a "Send" button.

Note, a user may change the default subject line and add a message to the email that will be sent.

A user may also simply copy the link to a saved search and past that anywhere.

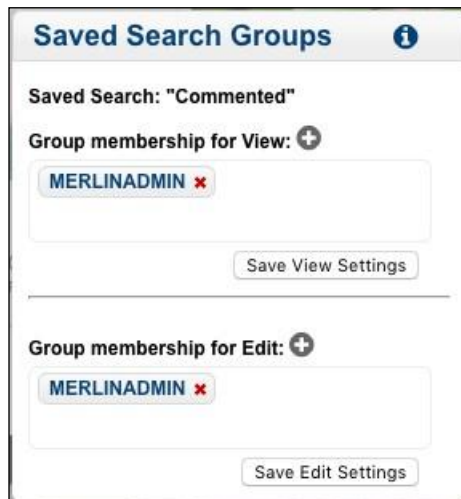
Expire a Search

Select a Saved Search and then the "Expiry" item in the Saved Search Tools cog icon to assign a date to expire and remove the saved search from the Saved Search area.



View Groups

Adjust the groups that have permission to see the "Shared" Saved Searches. By default, Saved Searches may be seen by users with common user groups. The Viewing and Editing of Saved Searches may be modified using the view groups option.



Add or subtract groups to control who may see and who may edit Saved Searches.

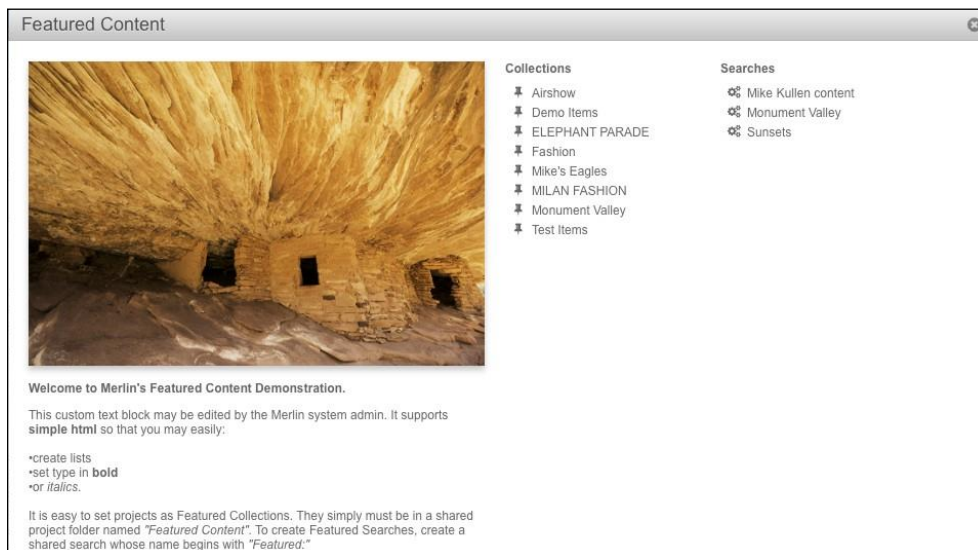
Note that not all groups that have View permissions have to have Edit permissions as well

Featured Content



When Featured Content has been configured, a special tool appears to indicate its presence.

Featured Content requires that either a Shared Collection folder or a Shared Saved Search folder exist, called "Featured Content" and that a "Featured Photo" has been set.

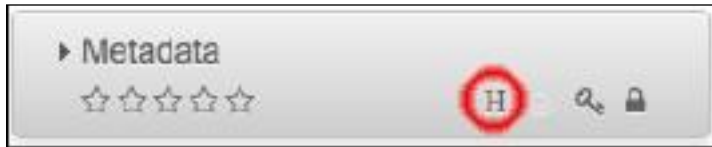


Any saved searches or collections contained within their respective shared folders will appear on the featured content page. Other Featured content items, such as the featured photo and the text included below the featured photo should be configured by an Admin user.

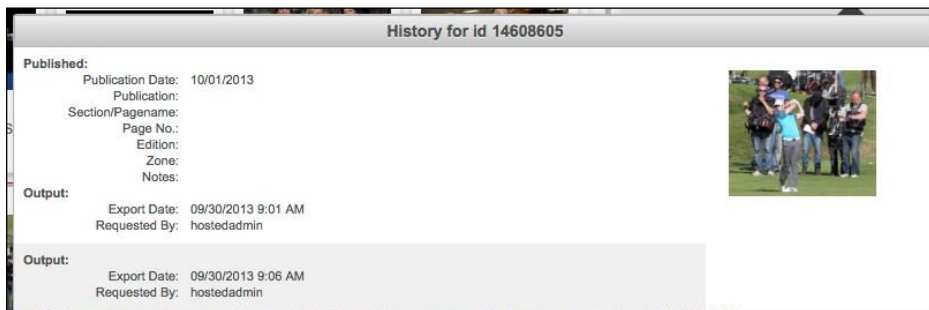
TIP: Featured Content may be set to the default display on login by the Admin user. Different featured content photo and text may be set for different user groups. See the Admin section for more information.

Viewing History

Any item that is downloaded or marked as “published” will have a “History” associated with it. The “H” badge in the metadata palette denotes this.



An item’s history is displayed by clicking the “History” badge in the metadata palette from any view. If there is no history, the badge will be “grayed” out.

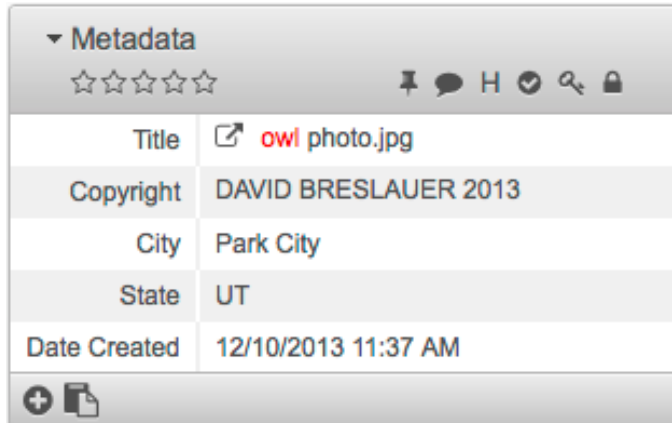


History will display information about items that were output, downloaded, emailed or shared as well as publication history when added.

Managing Metadata

Viewing Metadata

Metadata for selected items is displayed in one of the moveable palettes.



The metadata pane shows, when toggled open:

- ☐ Star Rating
- ☐ Collection Membership
- ☐ Comments
- ☐ History
- ☐ Review Status
- ☐ Rights Status
- ☐ Protect Status
- ☐ Selected Metadata fields

TIP: Show hidden fields by using the “plus” + button at the lower left of the palette. Use the “minus” - button to hide fields from the list. The “minus” button appears automatically when the mouse hovers over each field. Drag and Drop fields to re-order them in the list.



To show more (hidden) fields, use the “+” button at the bottom of the palette. Pick from the list to add hidden fields back to the list. Each site may have a different field list depending upon configuration. Use the “-” button that appears on mouse hover to hide fields one at a time.

An Admin user in the Fields section of the Admin area manages fields that appear on this list.

Rearrange fields

Simply “Grab” visible fields on the left side of the palette to rearrange with a click and drag.

Editing Metadata

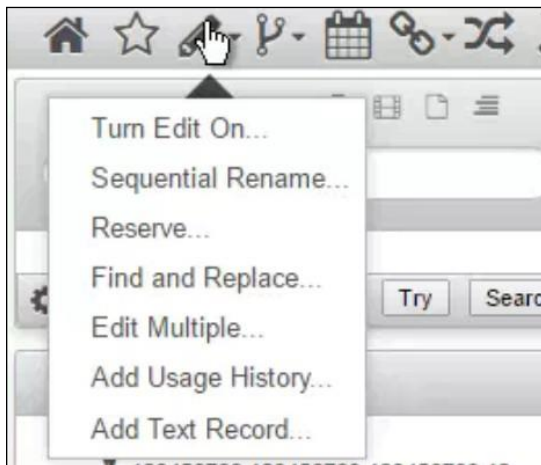


In order to edit metadata, a user must have edit privileges. If a user has edit privileges, they may click the Edit tool pencil in the tool bar and select "Turn Edit On" to enable editing. The tool turns red, acting as a toggle.

Using this tool metadata may be edited one record at a time.

The ability to edit certain fields may be defined by group membership or by "Edit Filters" that may be associated with a specific user or group.

Edit Options



Select the Edit Option desired from the Edit Menu item in the main tool bar:

- ☐ Turn Editing On
- ☐ Rename files sequentially
- ☐ Reserve content
- ☐ Find and Replace metadata for selected items
- ☐ Edit one or more items using Edit Multiple
- ☐ Add usage history to an item
- ☐ Add a blank "Text Record" when enabled

One Item At A Time

Turn Editing "ON," the pencil tool turns red. Make sure the fields to be edited are displayed in the metadata palette. Captions are unique in that captions are always available below the content area.

It is useful to arrange the fields that need to be edited together for convenience. Click in the field to be edited. Not all fields are editable.

Make the edits by either entering in data or picking from a list where that exists.

Some Picklists may be enforced, others not.

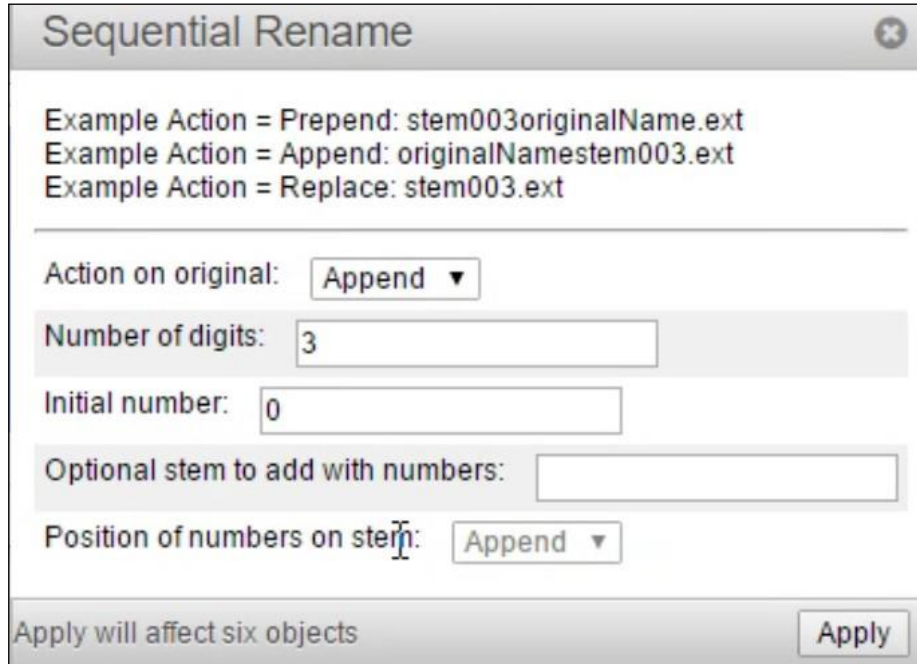
Move to the next field or another record. Use the Tab key to navigate or click using the mouse.

Edits are saved automatically.

Editable fields and Picklists are determined and configured by Admin users.

Sequential Rename

Rename selected items sequentially. Files will be named in the order selected, NOT the order they appear on the screen. Options include replacing the existing object file name, appending or prepending it with a "Stem" that may have a sequential number associated with it.



The dialog box is titled "Sequential Rename" and contains the following fields and options:

- Example Action = Prepend: stem003originalName.ext
- Example Action = Append: originalNamestem003.ext
- Example Action = Replace: stem003.ext
- Action on original: Append ▼
- Number of digits: 3
- Initial number: 0
- Optional stem to add with numbers:
- Position of numbers on stem: Append ▼
- Apply will affect six objects
- Apply

Action on Original options include: Append, Prepend or Replace. This operates on the original Merlin Object Name allowing a user to replace the existing file name or add to the beginning or the end. The user may use special characters like – or _ to enhance the visual look of the new name.

Set the number of digits to be used and the starting number.

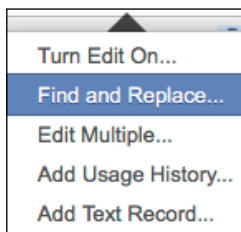
Add a stem in front of or after the sequential number. And remember, files will be numbered in their initial selection order, not the order they appear on the screen.

Examples include:

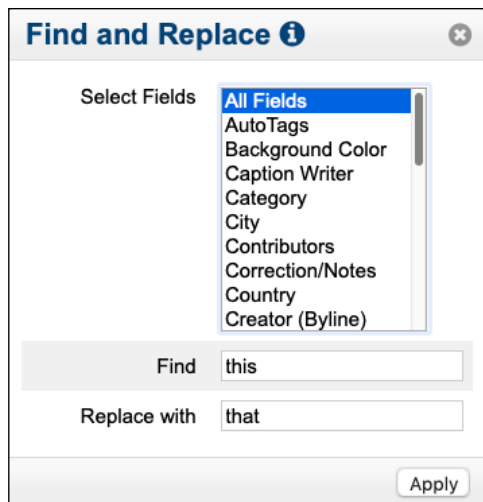
- ☐ stem003_originalname.ext
- ☐ 003stem_originalname.ext
- ☐ originalname_stem003.ext
- ☐ originalname_003stem.ext
- ☐ stem003.ext
- ☐ 003stem.ext

In this example the number of digits is set to three, the Initial Number is set to 3, the "Stem" word is "stem" and the original file name of the item is "originalname." "Ext," is the file extension if it was part of the original file name.

Find and Replace



Use the Find and Replace function from the Edit Menu to replace existing text with new text.



First select one or more records.

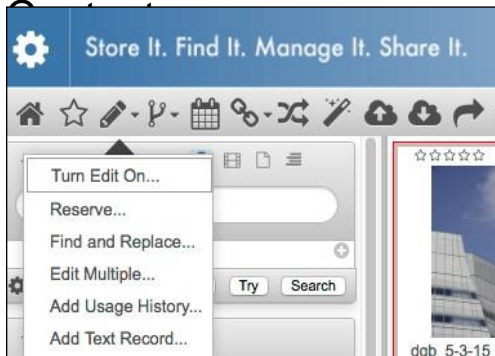
Then, choose the fields to be targeted by the function and then enter the find and replace values.

Once Apply is selected, Merlin will update all the selected fields for the selected items.

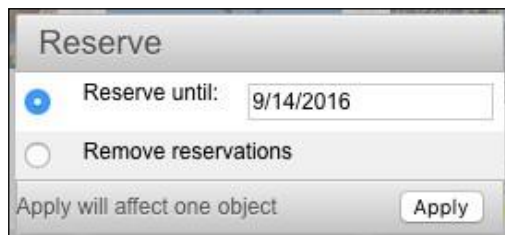
The "i" icon provides additional help.

Use a tilde (~) to find designated fields that are empty, or to replace specified "find" values with an empty string.

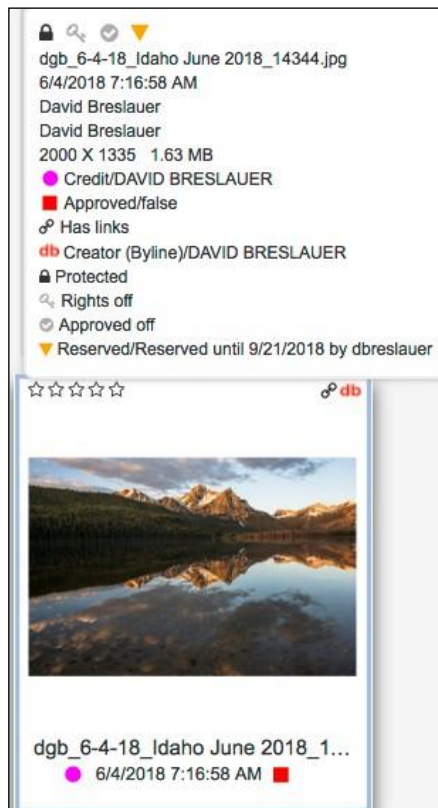
Reserving



Use the "Reserve" function in the Edit Menu to reserve items. Reserved items may not be downloaded by other non-admin users unless the user changes the reservation. This allows users to know that others intend to use an item, but does not preclude someone using the item, after they change the reservation (acknowledging someone had reserved it).



Add a date to the Reserve dialog. Other non-admin users will not be able to download the item until the reservation has expired



Reserved Items may have a warning triangle added to their "hover" text by default and will include explanatory text at the bottom of the "hover" text.

Editing Taxonomy Specific Fields

As in all edits, the user must have edit privileges and editing must be enabled. Click the pencil tool and select "Turn Edit On..." in the tool bar so that it turns red indicated that edits are enabled.

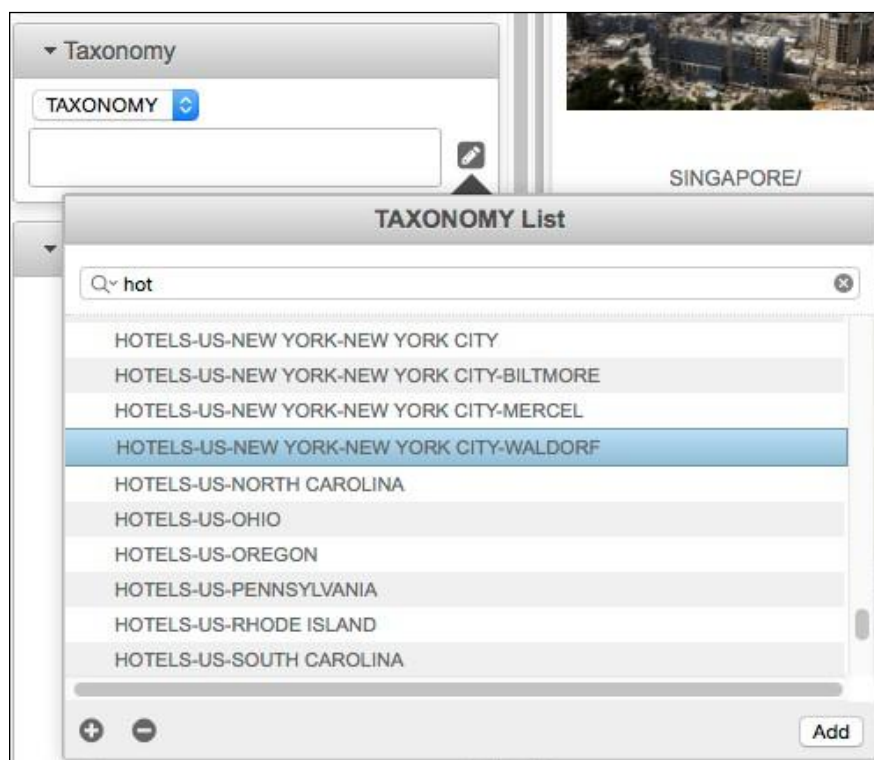
Use the Taxonomy Palette

Select either Taxonomy or Persons from the palette

Select the pencil tool IN the Taxonomy palette to initiate the Taxonomy editor

Navigate to the taxonomic value using the scroll bar or start to type to move down the list quickly or start to type to filter your list.

Select the value and then "Add"

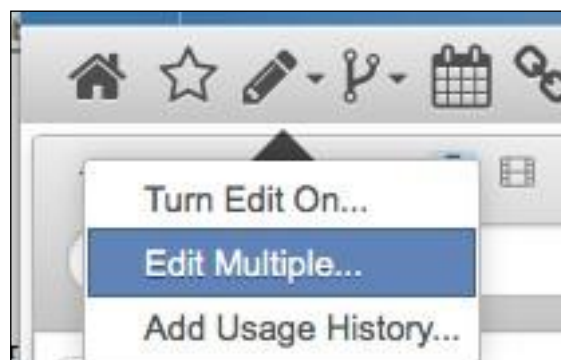


Adding New Values to Taxonomy Fields

Use the Plus/Minus buttons, lower left of the Taxonomy Editor to add new Taxonomic Values or to remove existing ones. (See above screen shot)

Editing Multiple Items

Select one or more items.
Select Edit multiple from the Edit tool
in the tool bar



Fields may be added by using the "+"
on the lower left of the form or
removed by using the "-" to the right of
individual fields.

Enter data for the fields to be edited
Select whether the existing data
should be Replaced, Appended or
Prepended

A message at the bottom reminds the
user about the by the number of
selected items.

A screenshot of the 'Edit Multiple' dialog box. It contains a list of fields with their current values and edit options. The 'Source' field has a dropdown menu open showing options: 'Ignore' (selected), 'Replace', 'Append', and 'Prepend'. At the bottom, a red message states 'Apply will affect three objects'.

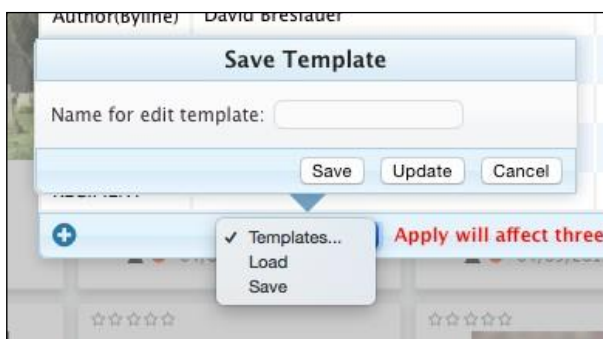
For logical fields check box, the edit
options are "Ignore" or "Edit." Set to
"Edit" to change the value to match
the check box setting. Uncheck the
box and set to "Edit" to uncheck
logical fields. Check the box and set
to "Edit" to mark the fields as checked
or true.

A screenshot of the 'Edit Multiple' dialog box, focusing on the 'Consent Given' field. The 'Edit' option in the dropdown menu is circled in red. Other fields like 'Approved', 'Protected', 'Rights', 'Source', 'Supp', and 'Category' are also visible with their respective 'Ignore' or 'Edit' options.

Using Templates to Edit Multiple Items

“Save” and “Load” templates to speed data entry. Metadata becomes readily accessible by saving popular metadata sets for use later; things like copyright information, or other rights specific information.

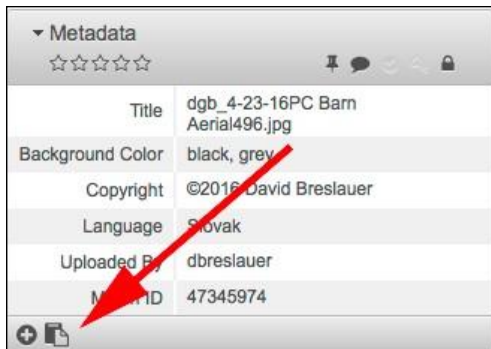
Templates are cumulative, that is if you “Load” more than one template, the new information will add to the existing template, overwriting previously entered data in those fields where data exists.



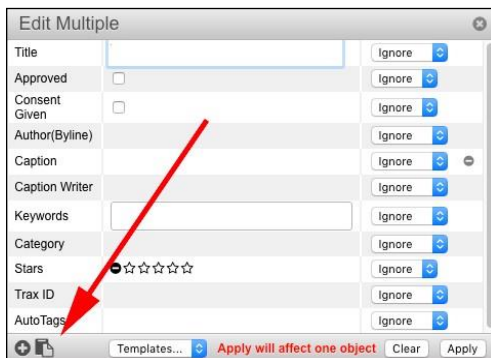
“Save” settings as a template, or “Load” previously saved templates to speed data entry.

Copy and Paste Metadata

Copy metadata associated with any item in Merlin to any other items.



To copy the existing Metadata, click the Copy button at the bottom of the metadata palette. This will copy all the metadata for that asset.

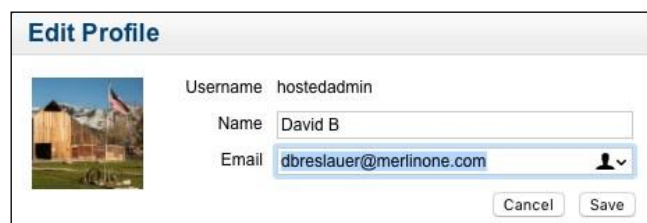
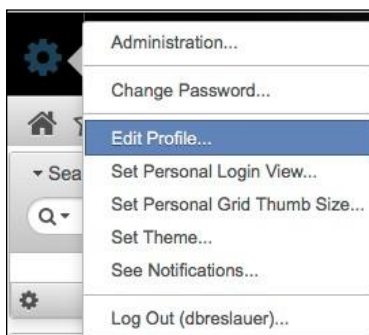


Then use the Edit Multiple option found in the Edit Multiple Menu to paste that metadata into one or more items selected. Revise as needed before using "Apply."

Using Comments

Configuring Profile used by comments

Add a photo, "friendly name" and email address that will be used in comments (and other features such as approvals).





Users may add comments to collections or individual items by selecting the Comment Tool that appears at the bottom of the Collections palette for collections and the top of Metadata palette for individual items. Note, that in order to comment, a user must have commenting privileges.

Whenever someone contributes to the commenting thread, all commenters will receive an email that includes the entire thread.



The Comment icon will turn red if there are comments associated with the item. collections or assets

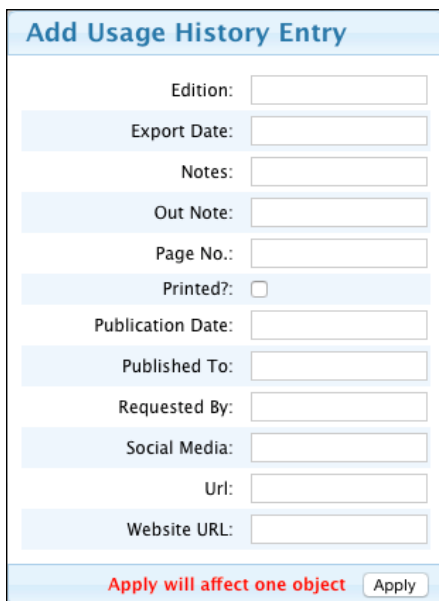
Clicking the "Comment" icon will allow the user to add new comments to the comment thread. Note the tool at the top of the Metadata palette.



Editing Usage (Publication) History

Usage history may be added at the time of output (if configured) or from the Edit options in the main tool bar. To Edit Usage History from the tool bar, select the "Add Usage History" from the Edit Tool.

TIP: Each time the Usage History is completed, or a new usage history is added on output, a new entry is created. It is not possible in the MerlinX web client to edit existing usage histories at this time.



Add Usage History Entry

Edition:

Export Date:

Notes:

Out Note:

Page No.:

Printed?: ☐

Publication Date:

Published To:

Requested By:

Social Media:

Url:

Website URL:

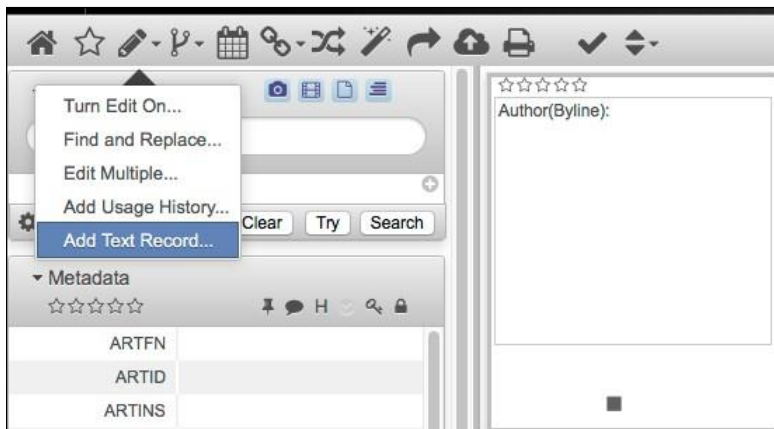
Apply will affect one object

Add usage related information to one or more items.

"Printed" indicates an item has been published.

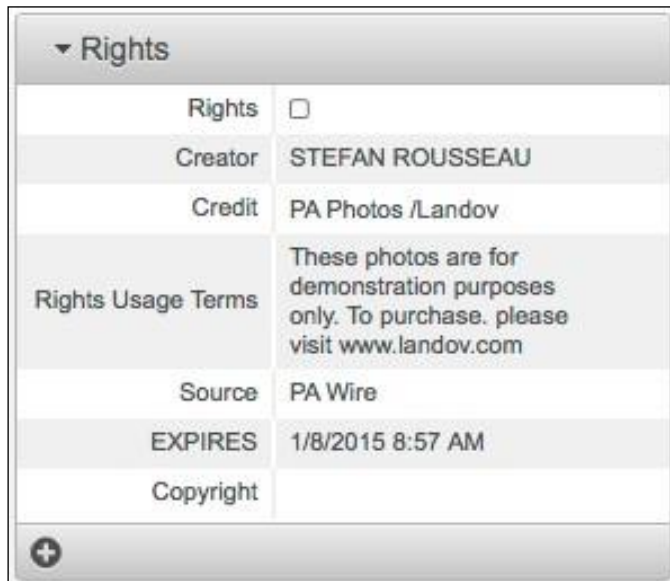
Field labels may differ from what is shown here based on the "Fields" configuration in the admin area.

Adding a new text record



For sites that are text-enabled, a user may create a new blank text record using this option. Once created, the text record may be edited by copying and pasting from another document or by simply entering data.

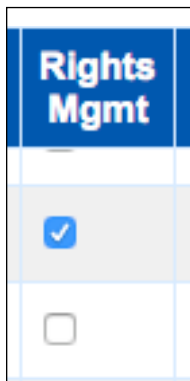
Rights Management Metadata Palette



▼ Rights	
Rights	<input type="checkbox"/>
Creator	STEFAN ROUSSEAU
Credit	PA Photos /Landov
Rights Usage Terms	These photos are for demonstration purposes only. To purchase, please visit www.landov.com
Source	PA Wire
EXPIRES	1/8/2015 8:57 AM
Copyright	

The Rights Management Palette is a secondary metadata palette that is designed to highlight rights specific information. This information may already appear in the standard metadata palette depending upon configuration.

The fields in the Rights Palette are managed in the same manner as fields in the standard metadata palette. They may be shown or hidden, and may be rearranged by drag and drop.



Rights Mgmt	
<input checked="" type="checkbox"/>	
<input type="checkbox"/>	

To make fields available to the Rights Palette, they must be selected in the “Fields” area of the Administration page. Checking the field for the “Rights Mgmt” permission will allow it to be available in the Rights Palette. As with other fields, their availability may be the default for all users, or set by groups. Metadata may be edited from either palette where the privilege exists.

Versioning Content/Check-Out & Check-In

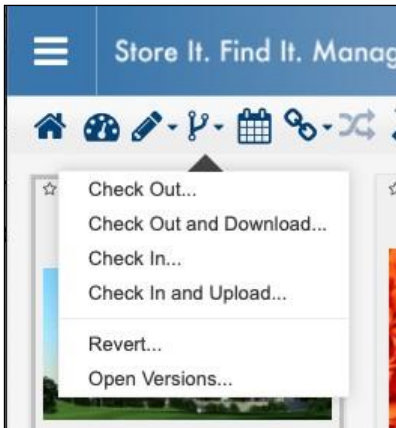


Versioning allows for privileged users to checkout content, check-in content and update existing content with new versions.

Privileges (set as part of user's group permissions) associated with Versioning include:

- ☐ Check out/in (also includes upload and download options)
- ☐ View all version
- ☐ Delete versions
- ☐ Revert to previous version

Check out/in



A user with this privilege may access the check out/in version tool in the tool bar. A user without this privilege will not see the tool.

A user may check out an item. Once an item is checked out, the version icon will be associated with the thumbnail.

Options also allow a user to Check Out and Download with a single click or Check in and Upload, streamlining the process.



In the default configuration, an item that has been checked out will be indicated with the Version Control icon. This icon will be red if checked out by the current user or blue if checked out by a different user. Once checked in, the version icon will continue to display, but will be gray. Some users may not have access to versioned content.

The revision Version number appears in the hover text.



When checking content in using the option associated with the check-in tool in the toolbar a user may opt to “Replace File with New Version,” or simply check it back in releasing the content to non-privileged users.

View All Versions

A user with this privilege will be able to view earlier versions of an item by selecting the “Open Versions” option associated with the version tool in the toolbar. All versions will be displayed.

TIP: Versioning requires the assigning of new Merlin ID Unique identifier to older items so that the current version maintains the original Merlin ID. This may cause items to reappear in a different sort order in some instances.

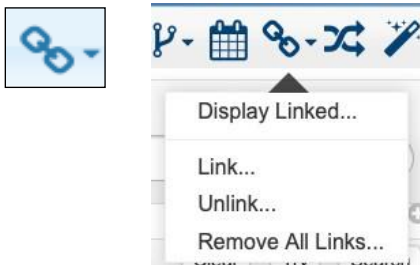
Delete Versions

A user with this privilege will be allowed to delete versions of items.

Linking Content

Items in Merlin may be linked to one-another. This may be an automatic process that has been set up for example content published on the same page of a publication, at the time of upload link content in the web upload form or after the fact, using the linking options in the Link Tool.

To manually link two or more items, select the items and then select “Link” from the Link area. Linked items will display the link icon. Use “Display Linked” so view linked items as a set.

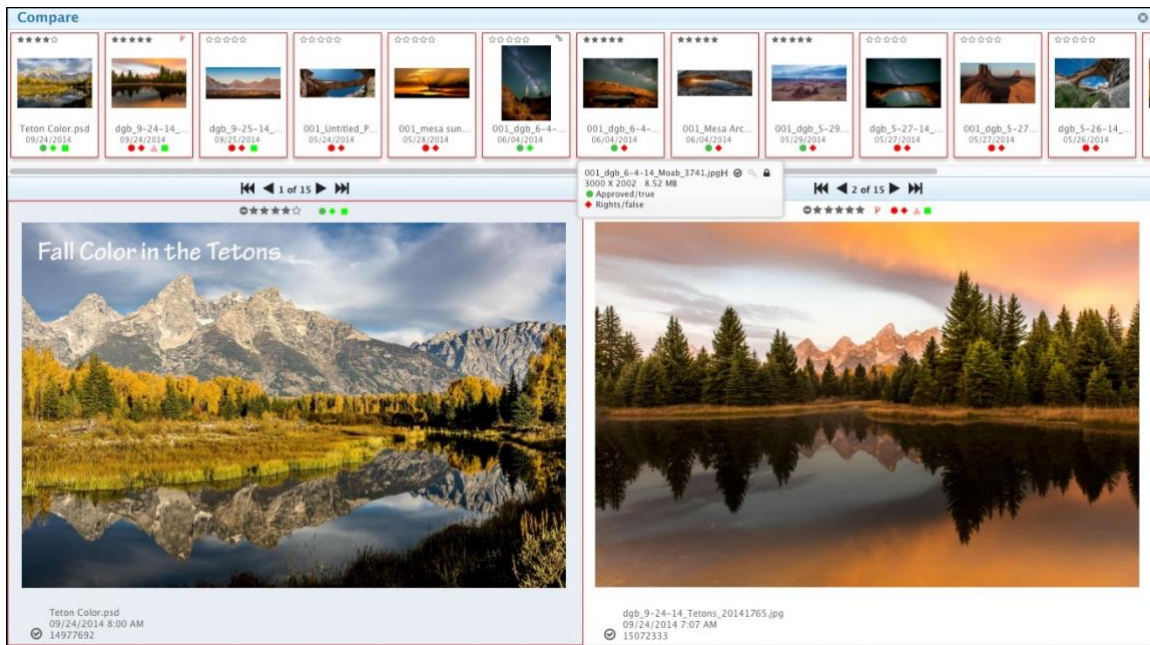


To unlink content, there are two options; “Unlink” and “Remove all Links.” Unlink simply unlinks the currently selected item from other selected content. Remove All Links removes breaks the link between the selected item and other content.

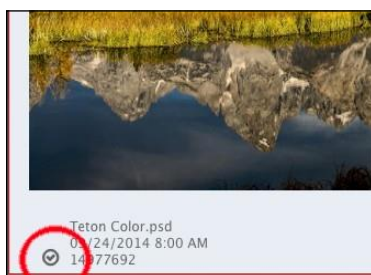
Compare Items



Use the compare tool to compare two or more items side-by-side. Select two more items and then the “Compare” tool.



Each window has its own set of navigation tools to move through the selected items. Note that color codes are viewable and the star rating may be edited.



Also note that items may be removed from the selection set by un-checking the circle in the lower left of each items compare view.

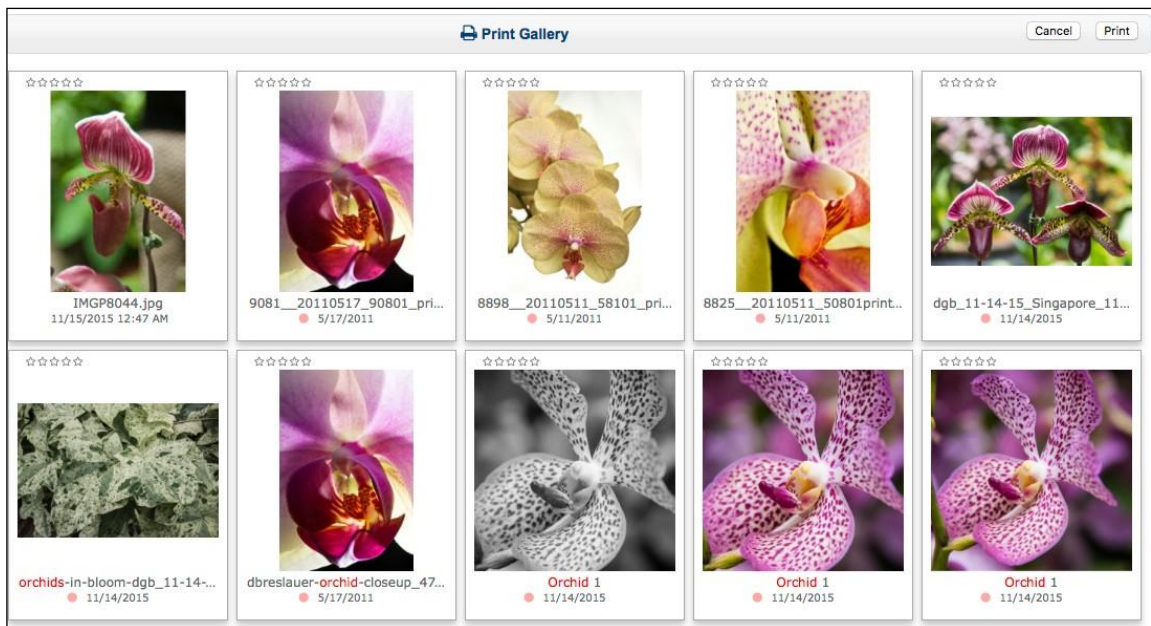
TIP: The star rating applies to ALL users.

Printing



Use the Print button in the tool bar to prepare content for printing. The print views created will be similar to the display view and uses the selected items.

For example, a user searches and has 55 results, but selects only 10 items, those 10 items will be sent to the printer. If the view is the gallery view, the printed item will be in gallery view. If the user has selected single view and 10 items are still selected, all 10 items will print, one per page, with metadata.



Example of Gallery View

Apply action?

Apply action to this record or all selected records?

This

Selected

When printing to Single View with Multiple items selected, Merlin will prompt to select the single item on screen, or all the selected items.

Orchid 1

☆☆☆☆☆

Views of Singapore, Nov. 15, 2015 Botanical Gardens,

Reference	Consent Given	<input type="checkbox"/>
Interim Approval	<input type="checkbox"/>	Title
AutoTags		Keywords
Date Created	11/14/2015	Date Input
Page		Publication
Creator Title		Source
Credit	David Breslauer	Category
City	Singapore	State
Country	Singapore	Rights Usage Terms
Person		Taxonomy
Copyright	©2015 David Breslauer	Copyright Year
Recipient	dgb2	Provider
Trax ID		Merlin ID
Date Expires		FEED
Background Color		Copyright
DURATION	00:00:00	Destinations
Foreground Color		Group
Language	English	Memorability
ORIGNAME		Orientation
Output Caption		Performance Date
Uploaded By		

Merlin Single View print sample with metadata.

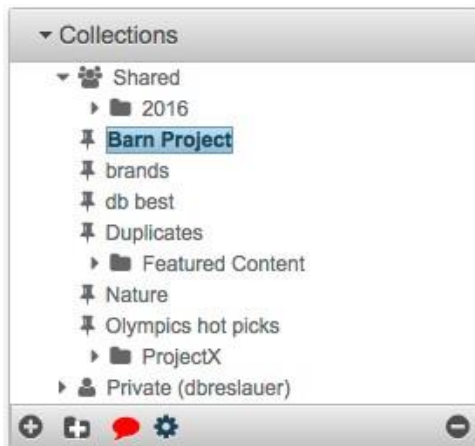
Using Collections

Collections are virtual containers. Some may refer to a collection as a light box, cart, folder or project. Items in collections are not duplicate items. They point back to the original items in Merlin. An item may belong to multiple Collections.

Collection

membership may be viewed using the "Collection Membership" tool in the Metadata palette. Collections may be organized inside of folders.

- Collections and Collection folders created in the Merlin rich client are visible in the MerlinX web client.
- Collections and collection folders created in the MerlinX web client are visible in the Merlin Rich Client.
- Collections and Collection folders may be shared with other users with access to Merlin.
- Removing an item from a collection does not remove the item from Merlin.



Collections Permissions

There are three permissions associated with Collections. These permissions are part of the User Groups to which users belong and are managed by an admin user.

- ☐ Edit Shared Collections—a user that has this permission may add content to or remove content from shared collections
- ☐ Move Shared Collections—a user that has this permission may move a shared collection from one shared collection folder to another
- ☐ Delete Shared Collections—a user that has this permission may delete shared collections

Users may only move their own collections from shared to private.

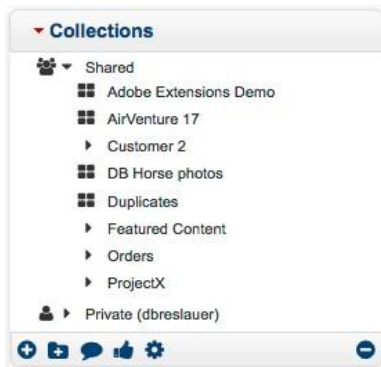
Viewing Collections

In order to view Collections, the Collection palette must be visible. The Collections palette may be relocated within the side panel or may be moved from one panel to the other. The palettes, as with all palettes, may be hidden from view by clicking the X that appears when hovering over the palette. It may be unhidden by clicking the “Palette” tool in the footer area.

Within the Collections palette, a user may elect to open or close the Shared and Private collection folder, and may also open or close any Collection folder by toggling the disclosure triangle that appears to the left of the Collection folder name. Some users may not have access to shared collections. Remember, a Collection folder may contain both other Collection folders or collections themselves; ONLY a Collection may contain content photos, graphics, etc.

To open a Collection, simply double-click on the Collection name.

The Collections palette with the Shared folder open and Private folder closed. Note the disclosure triangle to the left of each folder. The bottom of the palette includes the following tools:



- The round “+” to create a collection
- The round “-” to remove collections,
- Folder “+” to create a collection folder.
- Text bubble to comment on a collection (red indicates the collection selected has one or more comments associated with it)
- Collection Utilities for additional options.

Creating Collections

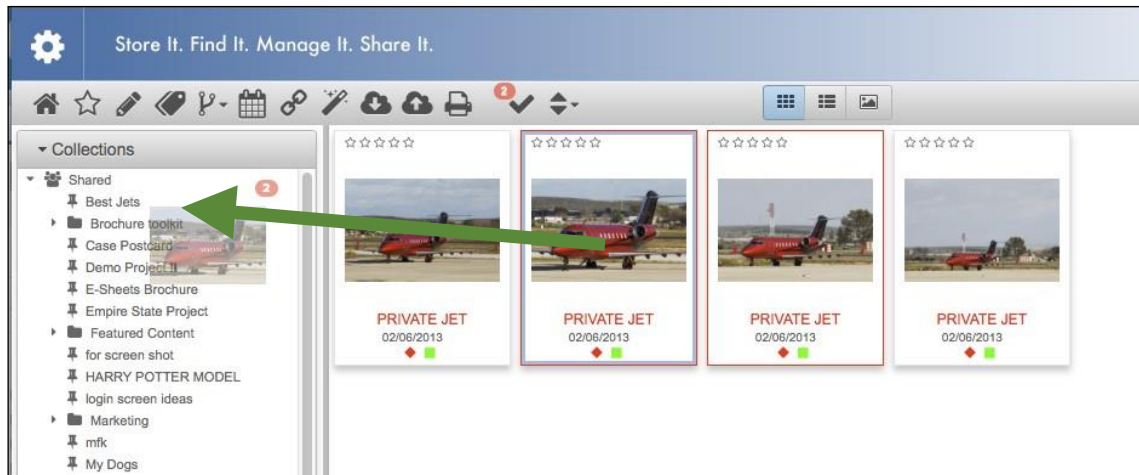
- Choose the destination of the Collection by clicking on “Shared” or “Private” or click on another folder contained within “Shared” or “Private.”
- Click the round “+” button, bottom left of the Collection palette
- A new Collection, named “untitled,” appears; ready to be renamed.

OR

- Drag an item or items to either top level folder Shared or Private and a new “untitled” collection will be created for those selected items.
Rename the collection.

Adding Content to a Collection

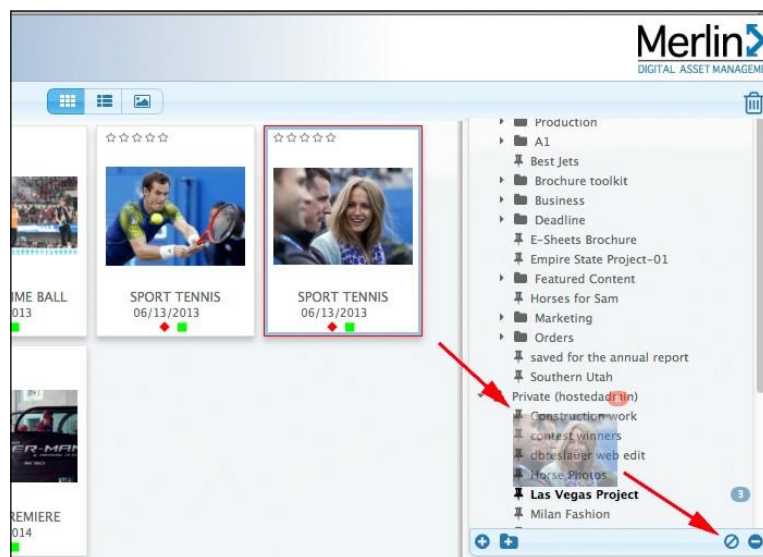
Select one or more items and use “click & drag” to add the items to the Collection. Remember that this does not duplicate the items; it simply creates a “pointer” to the original item so the same item may appear in multiple projects.



Dragging selected items to a shared collection.

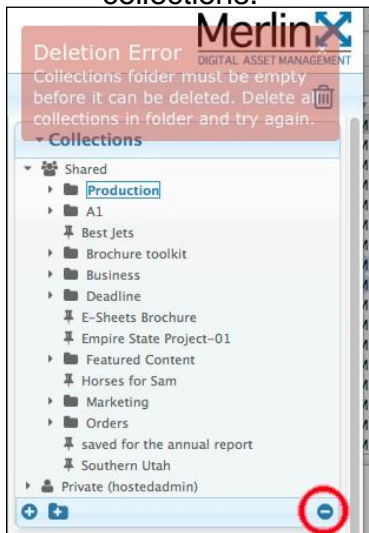
Removing Content from a Collection

Remove content from a collection by dragging it to the Remove button that appears on the lower right side of the collections palette. Removing content from a collection does not remove the items from Merlin or from other collections.



Deleting Collections

- ☐ Select and open the Collection to be removed
- ☐ Remove all content from the collection by dragging content to the “-“ sign in the Collection tool area. Not all users are allowed to remove content from shared collections.
Collections containing content may not be removed.
- ☐ Use the “-“ button, bottom right of the Collection palette to remove the collection. Not all users will have permission to remove Shared collections.

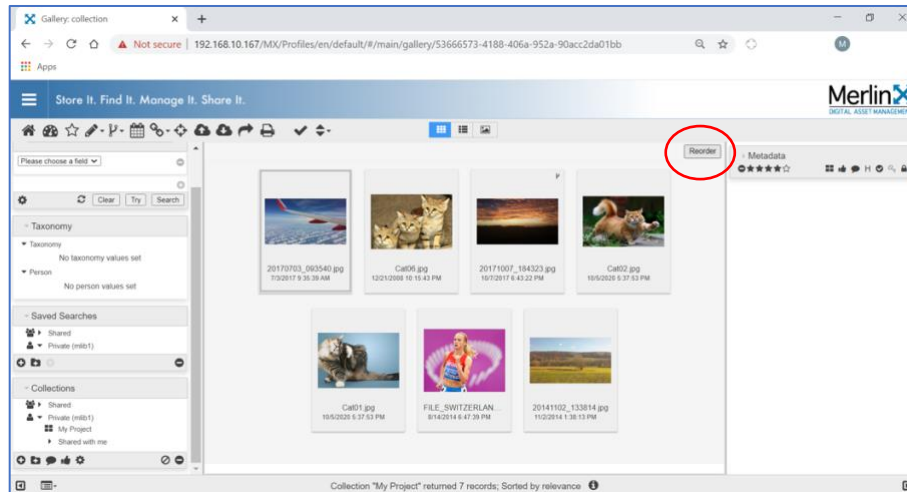


The “minus” sign removes collections and/or collection folders. A warning appears if a user tries to remove a collection folder that is not empty. First remove or relocate items within a folder, then delete the folder.

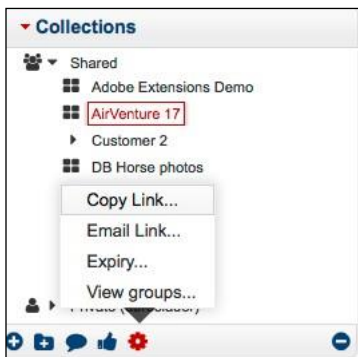
TIP: Accidentally deleted or expired collections may be recovered within a period of time. Contact MerlinOne customer service right away if you need assistance recovering a deleted or expired collection.

Re-ordering assets in a Collection

Select the “Reorder” button that appears in the top right corner of the open collection. The assets can be re-positioned by dragging and dropping to re-order. When done, click the “Done” button to save the order changes. If this is a shared collection, other users will now see the assets in the updated order.



Sharing a Collection or Collection Folder



To copy a link to an individual collection or to a collection folder to your clipboard (to use it elsewhere) use the Copy Link option in the Collection Utilities.

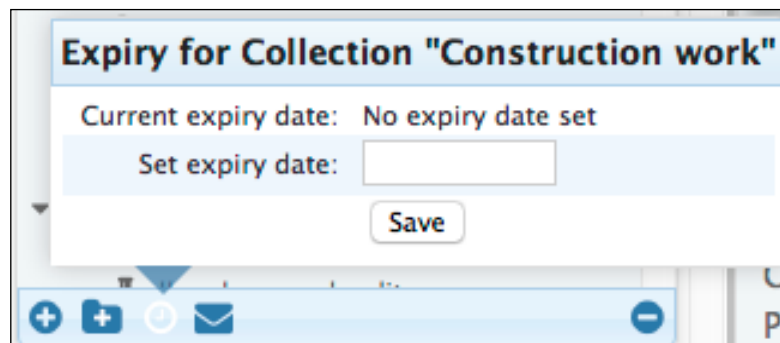
When sharing a Collection folder, all the Collection folders and Collections contained within the selected folders will be shared. The result is a grid of ALL content contained within all selected Collections sorted using normal sort options, not Collection order.

This is intended for users that have a Merlin DAM account.

Expiring Collections



A user may set a collection to expire by selecting the “Expiry” option from the Collection Utilities at the bottom of the Collections palette.

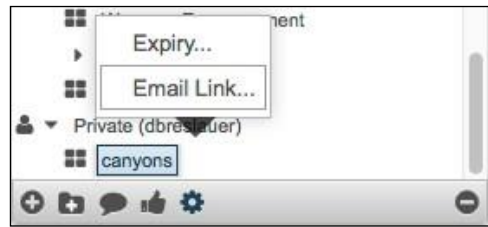


Enter the Expiration date.

TIP: Drag a selection set to a collection folder directly and Merlin will create a new “Untitled” collection. This includes the top level “Shared” or “Private” folders.

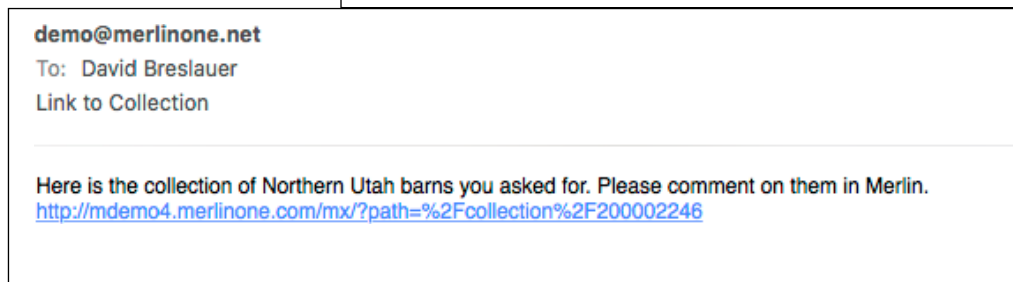
Email a Link to a Collection

Select a Shared or Private Collection and the "Email Link..." option from Collection Utilities. This is intended for users that have a Merlin DAM account.



Complete the dialog to prepare and send an email with the link.

Your recipient will receive an email with a link to the collection that includes the message you added. The link will appear at the end of the message.

A screenshot of the 'Email Link for Collection' dialog box. The dialog has a title bar with an information icon and a close button. The main content area is titled 'Collection: "canyons"'. It contains several fields: 'Url to send:' with the value 'https://mdemo5.merlinone.com/mx/?path=%2Fcollection%2F200002752', 'Email To:' (empty), 'Email CC:' (empty), 'Email ReplyTo:' (empty), 'Email Subject:' with the value 'Link to Collection in Merlin', and 'Email Text:' (empty). A 'Send' button is located at the bottom right.

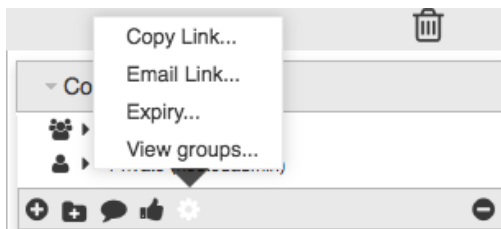
Once received, the co-worker may click the link, login to Merlin if needed and they will be taken straight away to the Collection in Merlin. When a user clicks on a link to a shared collection, if they have the necessary permission flags, they will be able to edit that collection. When a user clicks on a link to a private collection, they will be able to view the items in the collection, but will be unable to edit it.

Editing Access Privileges for a Collection

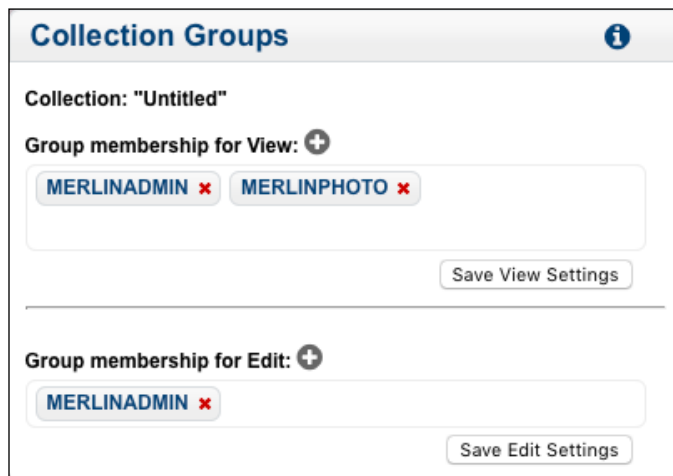
By default, Shared Collections may be viewed by users of a common group. However, that may be changed by reassigning user groups to view and/or edit privileges.



A tooltip reminds users of the function.



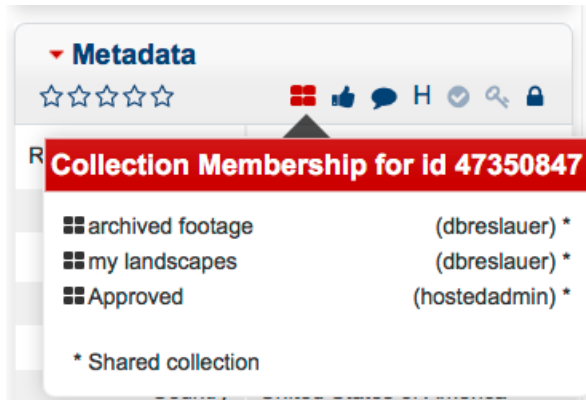
To change the default view permissions of a Shared Collection, select "View Groups" from the Collection Utilities.



Add or remove user groups from the list of available groups for both Viewing and Editing if they already have "Edit Shared Collections" as a group entitlement.

Collection Membership

To see what collections an item may belong to, use the “Collection Membership” icon in top of the Metadata palette.



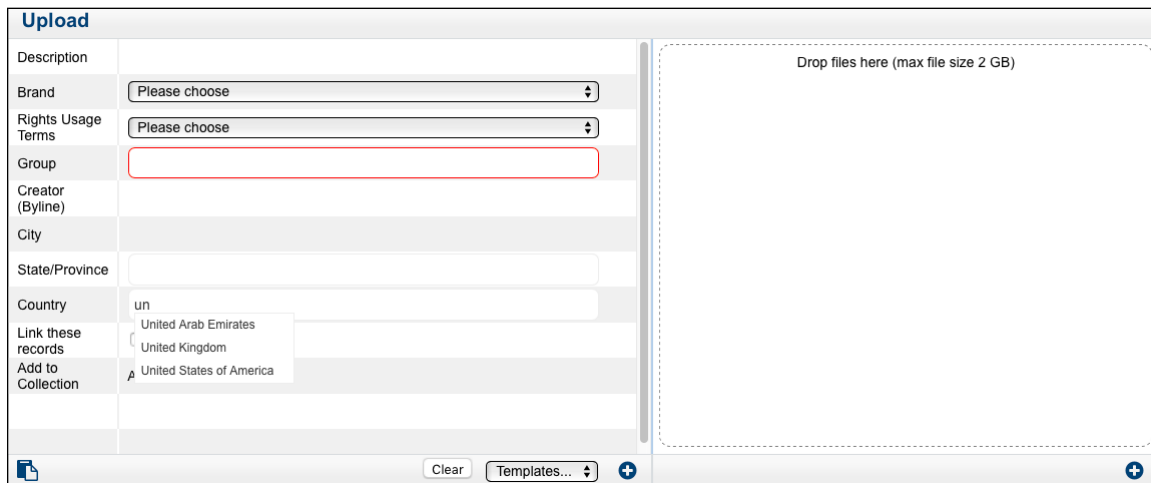
A pop-up will display the collections an item belongs to as well as the collection owner.

Clicking on the Collection name will take the user to that Collection.

Uploading Content

Upload Content using the Web Upload Form

Use the web upload form if you have the privilege as part of your user group memberships to upload a selection of items with common metadata; like caption, keywords, or byline. The information that may be entered in the form is configurable by a system administrator and can be set to replace, prepend or append to the metadata that may already exist in the photos. Note that fields may also be set to be mandatory.



The screenshot shows the 'Upload' web form. On the left is a metadata form with fields: Description, Brand (dropdown with 'Please choose'), Rights Usage Terms (dropdown with 'Please choose'), Group (text input with a red border), Creator (Byline), City, State/Province, Country (dropdown with 'un' selected and a list showing 'United Arab Emirates', 'United Kingdom', and 'United States of America'), Link these records, and Add to Collection (dropdown with 'United States of America' selected). On the right is a large dashed box labeled 'Drop files here (max file size 2 GB)'. At the bottom are 'Clear' and 'Templates...' buttons, and a '+' icon in the bottom right corner.

To upload items using your browser, users must belong to at least one user group with upload privileges.

To upload content:

- ☐ Select the "Upload" button in the tool bar.
- ☐ Complete the Metadata form, some fields are mandatory - noted in red and must be completed, your form will be different
- ☐ Either drag and drop content to the upload area, or use the "+" to navigate to content for upload
- ☐ Select "Start Upload" (Start upload will not appear until content has been added to the "Drop Files Here" area)

Options allow content to be linked together automatically during import or to be added to Collections automatically. These options may or may not appear for a given user, based on their privileges and admin settings. Click "Link these records" or the "+" Button to "Add to collection." Also, Metadata templates may be saved and reused.

Note the "Paste" button at the bottom, left of the upload form. This will paste information saved using the "Copy" button at the bottom of the Metadata palette into any visible metadata fields.

Once "Start Upload" is selected, the upload form disappears.

NEW: Since version 5.5 users may submit photos and videos at the same time. The files size limitation has been removed.
This allows users to add metadata to Audio and Video on import just like Photos, and at the same time.

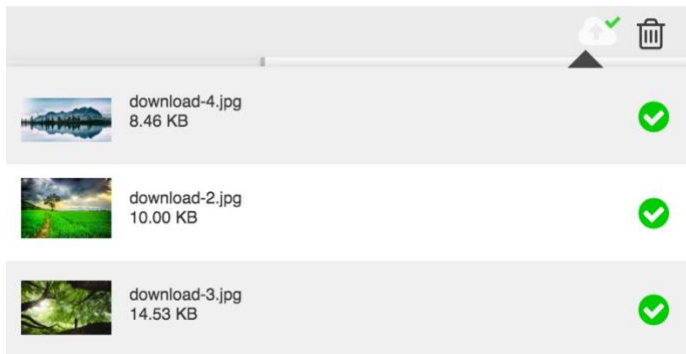
Upload Progress

The progress of uploads may be monitored. The Upload Monitor icon appears on the right of the tool bar when an upload is initiated.

When the Upload Monitor tool is selected, a status screen appears.

Upload Status

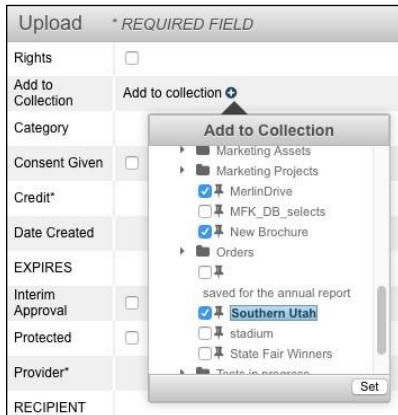
Click the Upload Progress icon in the tool bar to monitor uploads. Previous uploads from the same session may be viewed.



Progress indicators show if a file has successfully transferred and the status of files still in progress. Note this indicates the file transfer and not the actual import to Merlin.

Uploading to Collections

Users may add content to collections as part of the upload process. This includes both Private and Shared collections.

The screenshot shows the 'Upload' form with a '* REQUIRED FIELD' label. The 'Add to Collection' dropdown menu is open, displaying a list of collections: Marketing Assets, Marketing Projects, MerlinDrive (checked), MFK_DB_selects, New Brochure (checked), Orders, saved for the annual report, Southern Utah (checked), stadium, State Fair Winners, and Test to success. A 'Set' button is at the bottom of the dropdown. The form fields include Rights, Add to Collection, Category, Consent Given, Credit*, Date Created, EXPIRES, Interim Approval, Protected, Provider*, and RECIPIENT.

Content may be added to multiple collections by selecting more than one collection.

Users who are not allowed to edit shared collections will not be able to upload to shared collections.

Users may create new collections from the Upload form by clicking the "+" at the bottom of the 'Add to Collection' window.

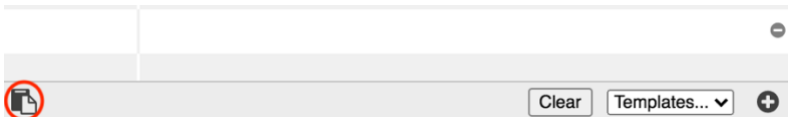
Using Metadata Templates For Upload

Use the Template pulldown at the bottom of the Upload Metadata screen to save and reuse frequently used metadata.

Populate the Metadata panel and select "Save." Name the Template.

To reuse the template select "Load."

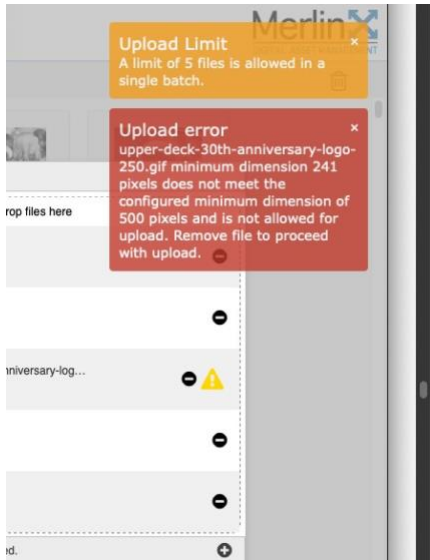
Modify the loaded results if desired.

The screenshot shows the bottom of the Upload Metadata screen. It features a 'Clear' button, a 'Templates...' pulldown menu, and a '+' button. A red circle highlights a copy icon on the left side of the screen.

Users also have the option to "Paste" data copied from the metadata palette by using the copy icon circled above.

Setting Minimum and Maximum Size Requirements for Upload

This feature is [managed in the Admin](#) area by Admin users. It allows for the upload of files with maximum and/or minimum sizes based on pixel dimensions. You can also control the maximum number of items that may be downloaded at a time.



If too many files are selected, or a file is too large or too small, MerlinX will respond with a “growl.”

The maximum number of files that may be uploaded at a time when the file size limits are imposed is 25.

Exporting Options

Exporting includes local downloads, sharing and sending directly to external systems using workflow targets. “Download” is a separate tool from “Share.” A download will direct the selected items to the users’ local computer. Sharing export will share a link. The browser the user has selected to access Merlin will determine the destination of the downloaded items.

Some browsers direct content to a pre-defined download location. Others allow the user to select the download destination as part of the download process. For some users, sending to a “Workflow” in the workflow palette will initiate an export.

Download Filters

Download

User does not have permission to download the following Merlin IDs:
47356538. Contact Susan Smyth in the Library (Ext. 1234) for assistance with the items not allowed for download.

User does not have permission to download any of the requested Merlin IDs.

Click here to email request for access to filtered assets.

Request access to filtered ids

To:

User's Email:

CC:

Subject:

Reason:

Filtered IDs:

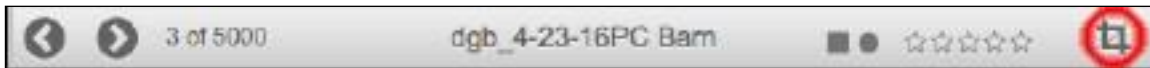
Some content, though viewable, may be download restricted, based on metadata and a restriction applied by an admin user. See the Admin section for more information on configuring this.

When a user tries to download restricted content, they will be presented with a message indicating it is restricted and will be provided contact information. A clickable link will allow them to email the contact.

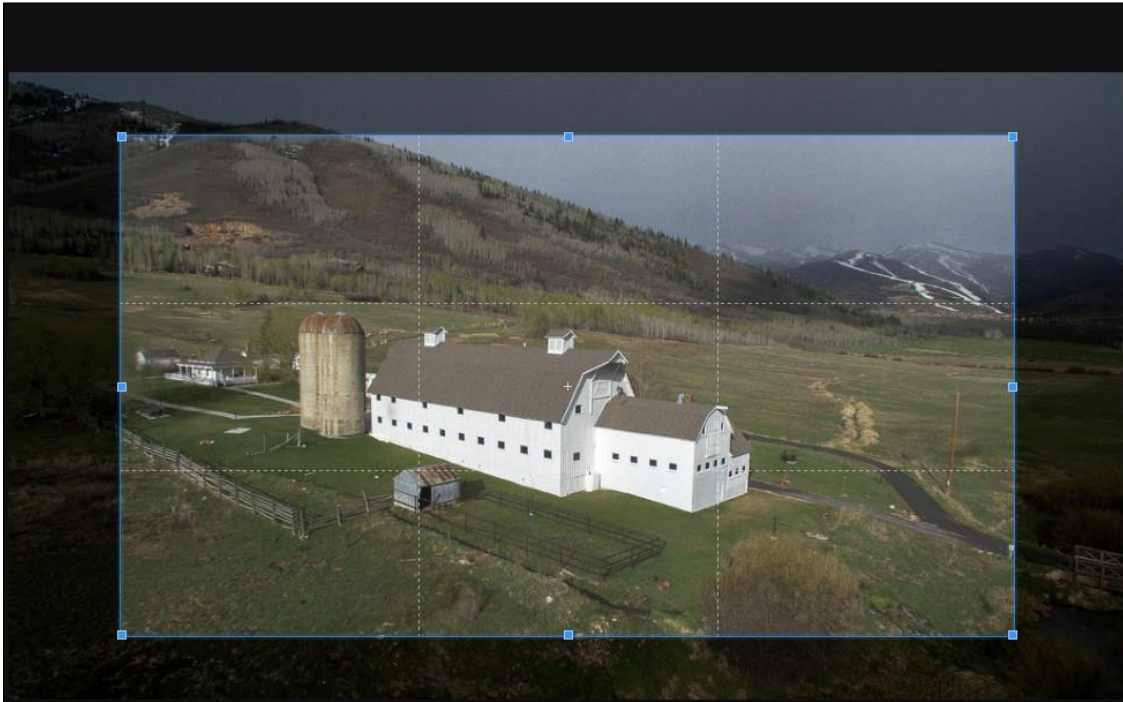
A user may have the privilege to export content one at a time or request a batch of content. They may also, depending upon configuration, have the ability to order content. This privilege depends upon the user’s group membership and the group’s privileges download and in some cases, membership in a specific group by name.

Cropping Content

A user may add cropping instructions for content for export. Merlin never touches the original file. All changes, such as cropping and metadata edits are added to the copy of the file on export download or share. Any image type that may be converted on output (jpg, png, tif, gif, bmp, png, psd) can be cropped. Files being converted into pdf at time of output can be cropped, but pdf files cannot be cropped.

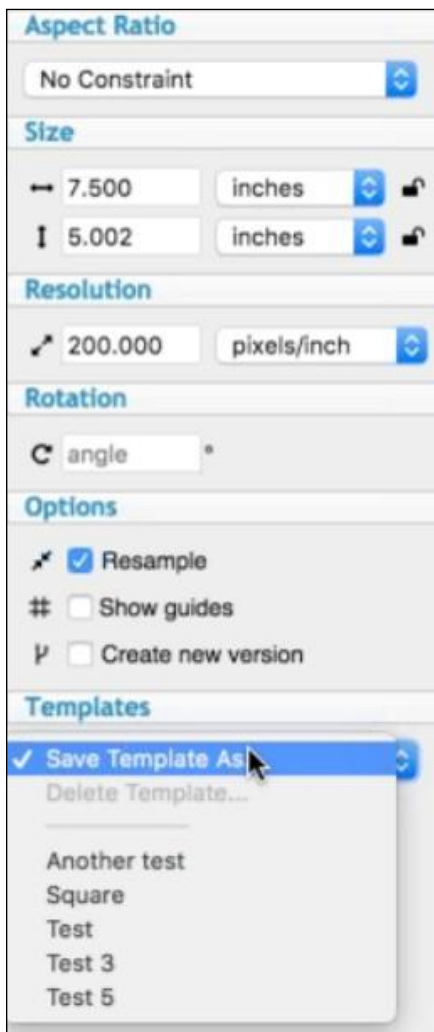


The crop tool is accessible from the tool bar associated with the Single View. Click the Crop tool to access the crop view.



Adjust the crop as needed by "grabbing" the handles of the crop box with a mouse click and drag to where desired. If an "aspect ratio" is selected the movement of the handle may be constrained.

Crop Options include:



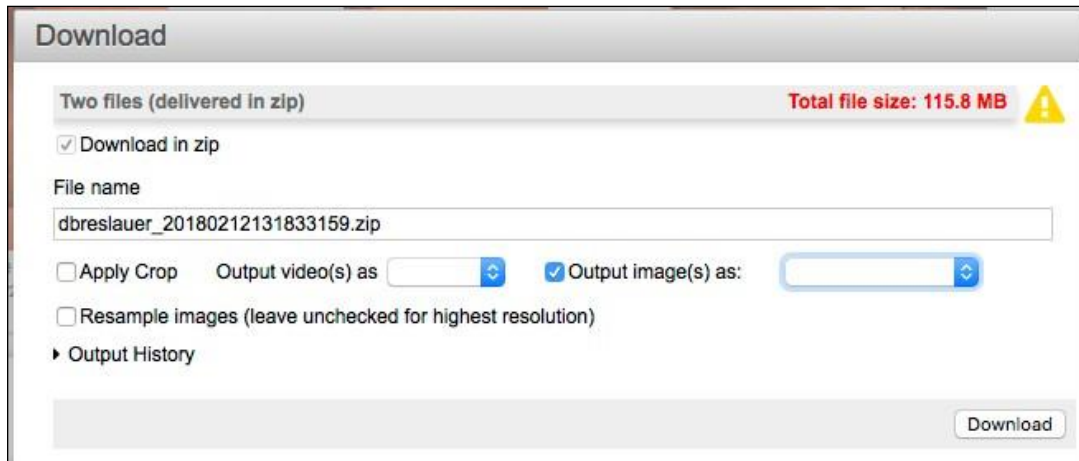
- Setting a pre-defined aspect ratio
- Size Options include Inches, Centimeters, Points, Picas and Pixels.
- Use the lock icons to constrain the width or height.
- The Output Resolution
- The Rotation of the image
- Other Options include:
 - Resampling on output
 - Showing guides in the crop area
 - Creating a new version of the Cropped item
- Save crop templates for reuse and reapply them to other images at any time. To create a Saved Crop Template, set the crop window as desired, and then select “Save Template As...” and name the template for rapid access and reuse.

Download Content



Selecting Download will cause the options for the download process to appear. A download will be delivered to either your browser's designated download location or a location specified by the user; this is browser dependent.

TIP: Note that a download destination is different than a “share” or an “output” to a workflow target



To download eligible items:

- Select one or more items
- Select the download icon, the download dialog will appear
- Complete the dialog

User options include:

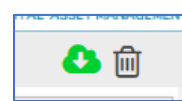
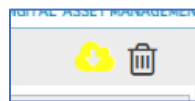
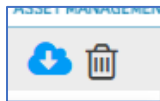
- Total file size is shown in the upper right. A warning appears upper right if the download exceeds 100MB.
- Download as a zip file.
- Rename the file.
- Apply a crop. This ONLY appears if one of the selected items has a crop associated with it.
- Output the file in a different format with separate options for Video and photos
Video Output choices are “Original” and “Proxy”
Image Output choices are “Microsoft BMP,” “Compuserve GIF,” “JPEG,” “PDF,” “PNG,” “PNG” and “TIFF.” These are the file types that may be converted:
"jpeg", "jpg", "tiff", "tif", "png", "gif", "bmp", "psd", "nef", "crw", "cr2", "dng", "dcm", "dcr", "mrw", "jp2", "jpt", "j2c", "j2k", "orf", "pcd", "pcds", "svg"

- Resample images voids crop option. Cropping allows for both a resolution change and a crop.
- Add an “[Output History](#)” see the end of this section.

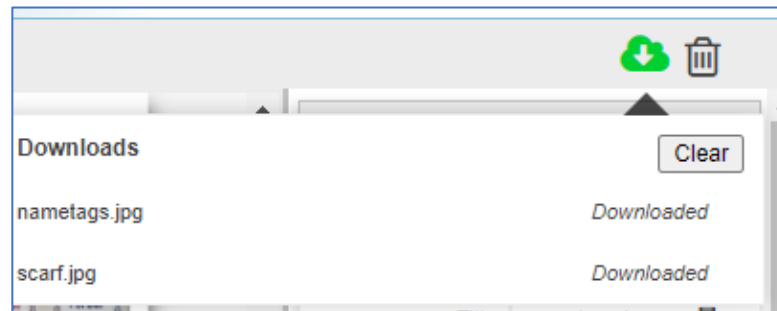
TIP: Output options affect ALL items selected for appropriate file types.

Download Progress Indicator:

When a user downloads one or more files, an indicator is added to the top right of the toolbar. The icon’s initial state is blue. If files are in queue to download (ie. the requested file(s) isn’t ready yet), the icon will be yellow. The icon will turn green when all requested files have been downloaded. The icon will turn red if there is an error found in any download request.



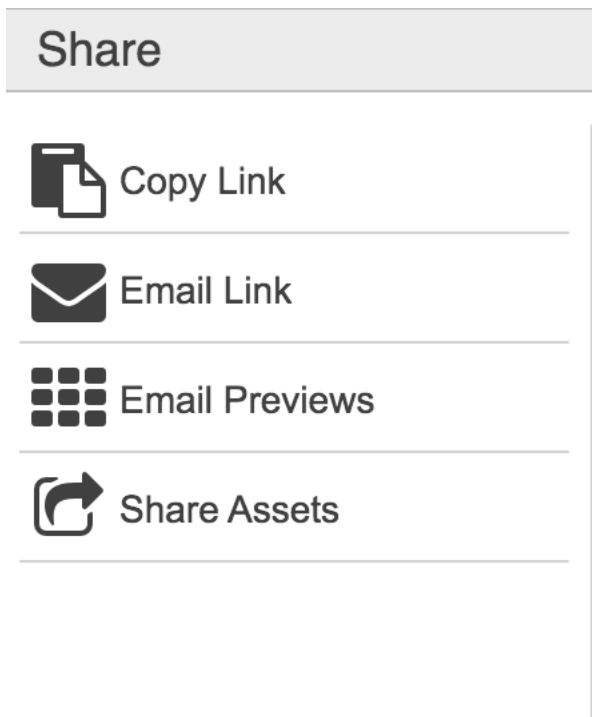
If the user clicks on the icon, the list of downloads requested during the current session will display, and the current or last status of each asset is shown.



Sharing Content



The Merlin Share Tool allows several ways to share Merlin Content. For external (those without Merlin access) and internal (those with access) choose from the Copy Link, Email Link or Email Previews options. For internal sharing with other Merlin users use the Share Assets option.



Additional choices display when you select email link and email preview options. They may include:

- Renaming on download
- Resampling of images or video
- Cropping
- Converting to other file formats

In addition to downloading and sharing as described in this section, Merlin also allows for the assigning of content to defined users with special access to Merlin. This may be done using the [Recipient](#) workflow or a user may be sent a contact sheet of the results on screen.

Copy Link



The copy link option allows users to copy a link to either the high resolution or lower resolution asset. The link can be sent to a non-Merlin user. The recipient can open the link and view the asset in the browser. The asset can be easily downloaded through a right click while viewing in the browser.

Copy link for BBC MUSIC AWARDS

High Resolution Image

<https://mdemo34.merlinone.com/mx/go?id=rx421hdhd0p>

Large Thumbnail Image

<https://mdemo34.merlinone.com/mx/go?id=0ua1a4g0ojp>

Email Link



The Email Link option will send a link to addresses added to the export dialog. The link to the compressed file is valid for 24 hours. This is configurable; contact MerlinOne Customer Service to change the default download expiration. Files will NEVER be larger than their original file size, Merlin will not up-sample content when using the “Resample Images” option.

Select one or more items, select the Share tool, and choose Email Link. Simply complete the form and a link will be sent to people defined in the email. Note that the Email Link form is similar to the download form.

User options include:

- ☐ Rename the Zip file
- ☐ Email Addressee, CC, Reply To and Subject
- ☐ Include a message
- ☐ Convert video and images to other file formats
- ☐ Resample Image Files
- ☐ Apply a crop if one of the selected files has a crop indicated
- ☐ Add a [Usage History](#) if that has been configured. This may be mandatory for some users.

Share

Copy Link

 Email Link

 Email Previews

 Share Assets

One file (delivered in zip) Total file size: 950 KB

File name

Merlin_20201230164844678_hostedadmin.zip

To

CC

Reply To

Subject

Message

☐ Output image(s) as:

☒ Resample images (leave unchecked for highest resolution)

☒ Small (240px)

 ☐ Medium (500px)

 ☐ Large (1024px)

 ☐ Other

demo@merlinone.net

December 2, 2014 at 8:33 AM

Merlin Mail

D

To: David Breslauer
 Merlin Archive Batch Zip file ready for download.

Batch download zip file, FB9DEE63-B333-437F-974D-0F93308B6737.zip is ready for download.
 Click on the link below. Note, the zip file will only be available for download for the next 24 hours.

ZIP archive:
 FB9DEE63-B333-437F-974D-0F93308B6737.zip
 2 Files
 28 KB

<http://mdemo.merlinone.com/MX/zips/FB9DEE63-B333-437F-974D-0F93308B6737.zip>

MerlinOne Support

Sample Email with embedded link to files

Email Previews (Sharing a Contact Sheet)



Email Previews

To send a contact sheet, select one or more items on the screen. The selected items may be sent as a contact sheet to anyone, even if they do not have a Merlin account. The user will be sent a link that will expire. (The expiration period is set on the server, contact MerlinOne customer service for help resetting this.) Click “Email Previews” to create a contact sheet that may be sent to external users.

Note: Preview recipients must have access to the server. For Hosted sites this requires Internet access. For on-premise sites this may not require Internet access; consult your local administrator for more information.

No more than 100 items may be selected for the purpose of sending Email Previews.

Complete the form. Change the description from the default, and include a message to accompany the emailed link.

Note, if the user preparing the contact sheet has download privileges, they may allow the receiver of the Previews to inherit those privileges by checking “Include Download Links.”

Also note, it is possible to generate a link without actually sending an email, use the “Generate Link” checkbox.

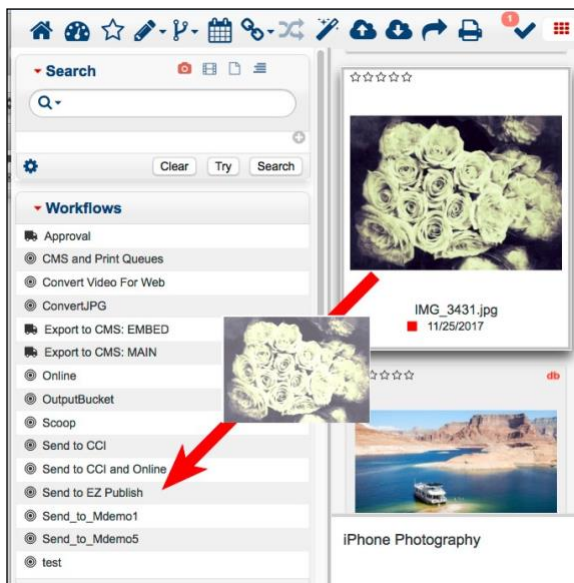
Share Assets (Internal Sharing)



The Share assets feature allows users to easily select from a list of internal users to share selected assets with. If the recipient has an email address associated with their profile, they will receive an email notifying them that a specific user has shared assets with them. They can click on the link within the email and view the asset from their Merlin instance. Recipients of the share can also reference the assets shared with them in the Private Collection folder labeled “Shared with me” in a collection named after the sender. This functionality allows users to share with other users beyond any internal search filters configured.

Workflow Output Targets

Send content directly to remote locations like FTP servers or watched folders on CMS systems with a simple drag and drop.



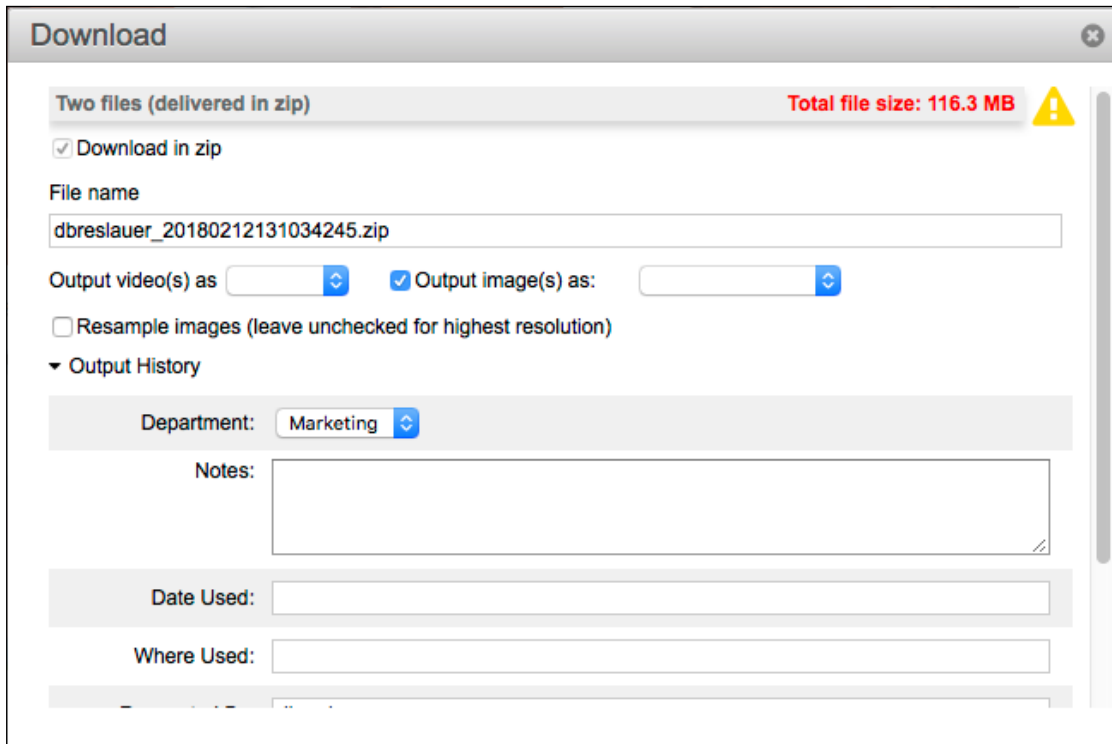
These targets appear in the Workflow Palette. Simply drag and drop content to the target and Merlin will forward the content to the destination.

Workflow targets have the same options available as downloads including adding [Output History](#). Different target types may have different icons.

Workflow Targets, require some server-side configuration.
Contact MerlinOne Customer Service with your workflow target requirements.

Adding Output Usage History

Add Output History to an item or groups of items on export, download, share or workflow target to track how content will be used. **This must be configured in the MerlinX [admin area](#).** Completing the Output History may be optional or mandatory depending upon the system configuration. If it is mandatory, a user **MUST** complete the required elements of the form before the export will be permitted.



The screenshot shows a 'Download' dialog box with a title bar and a close button. The main content area has a header bar with 'Two files (delivered in zip)' on the left and 'Total file size: 116.3 MB' on the right, followed by a yellow warning triangle icon. Below this, there is a checked checkbox for 'Download in zip'. The 'File name' field contains 'dbreslauer_20180212131034245.zip'. There are two dropdown menus for 'Output video(s) as' and 'Output image(s) as', both with blue arrows. A checkbox for 'Resample images (leave unchecked for highest resolution)' is present. The 'Output History' section is expanded, showing a 'Department' dropdown set to 'Marketing', a 'Notes' text area, a 'Date Used' field, and a 'Where Used' field. A scrollbar is visible on the right side of the dialog.

The ability to add Output History, if not displayed, may be accessed by using the disclosure triangle next to “Output History.” What appears is configurable by an Admin user. This includes the fields, their labels, default values and Picklists. Note, different types of exports may have different fields and Picklists. Some fields may be mandatory.

TIP: Usage history is available for viewing both in reports and by clicking the “H” icon in the metadata palette.

Deleting Content



Deleting content from Merlin is a simple drag and drop operation. A user must have delete privileges as part of their user group in order to delete.

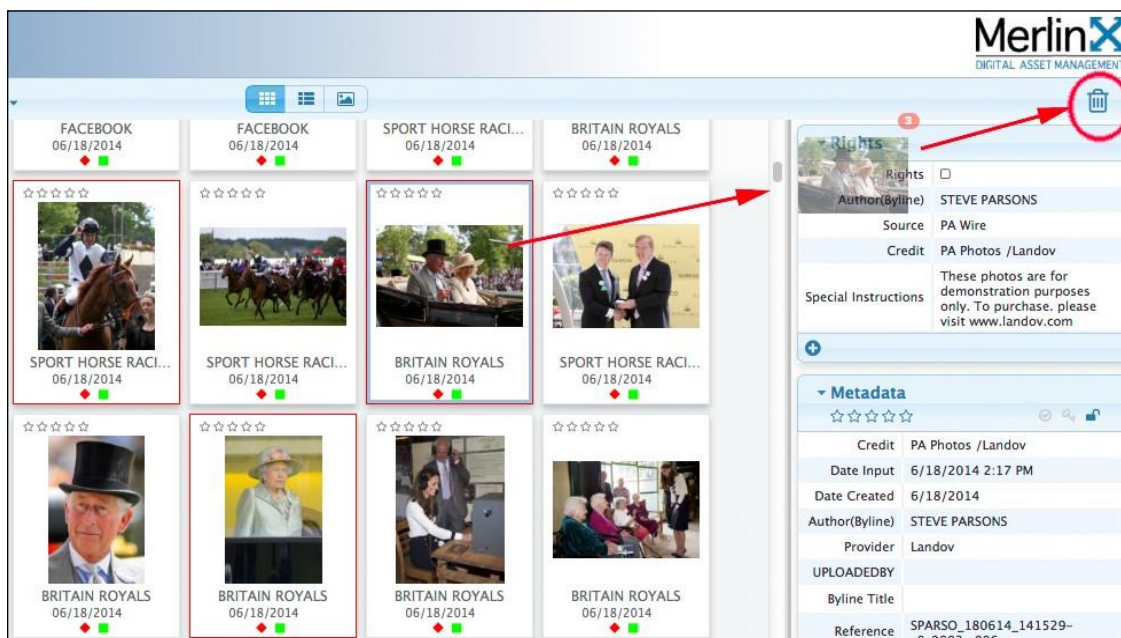
When items are deleted using the MX trash can tool, they are removed from all collections and they are de-linked from any linked items. If the item is restored from trash, these associations are NOT restored.

Note that there are levels of delete configured as User Group entitlements:

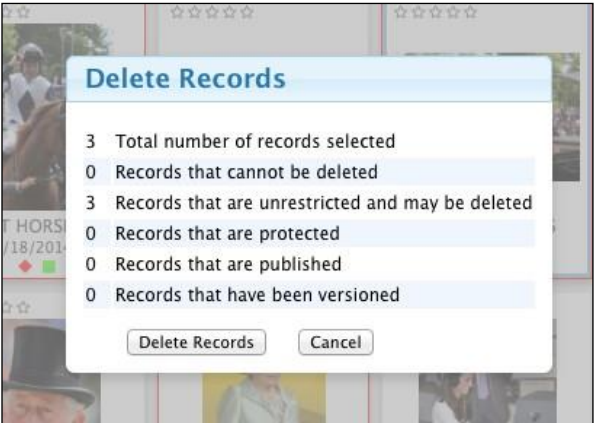
- Delete Checked refers specifically to the Librarian or Approved check box
- Delete Published refers to items with a publication history
- Delete Versioned refers to items that have versions associated with them
- Delete Records allows deletion of content that is not excluded by the previous rules

Users with Delete privileges will have a trashcan icon in the upper right side of the tool bar.

To delete content, select one or more items and drag to the trash can in the MerlinX browser window.



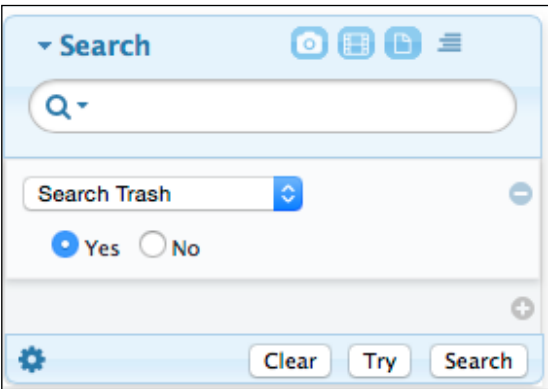
Merlin will respond with a confirmation screen with the delete status for the items selected.



Searching the Trash


When a user puts an item in the trash, it lives in the trash for a defined period of time, 7 days by default. That means a privileged user one with Administration rights as part of their Merlin User Group may search and retrieve content from the trash during that window.


TIP: Merlin Customer Service can change how long the trash is held before being emptied.



To search items in the Trash, use the Search area, and select “Search Trash” from the Picklist of search options. This may be combined with other search filters to search for specific items in the trash.

The results screen will indicate that the Trash is being searched, the Trash tool, upper right, changes.

	Indicates normal Trash functionality. Drag content here to add to the Trash.
---	--

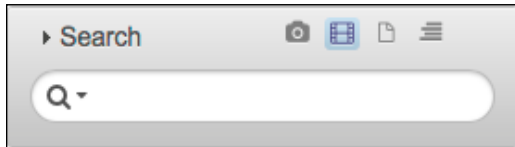
	Indicates the Trash is being searched. Drag here to restore from Trash
---	--

To restore an item from the Trash:

1. Search for the Trash
2. Select the items
3. Drag to the Restore from Trash icon
4. An acknowledgement will appear.

IMPORTANT: Deleting Content putting it in the Trash is not the same as an automated purge where configured. Deleted content lives in the trash for a defined period 7 days by default. Content removed because it has expired, and where auto purge has been set up, is removed immediately. There is no process to retrieve auto-purged content. Note, when an item is marked as deleted, it is removed from all collections and all links to associated items are removed. If it is subsequently restored from trash, it is NOT added back into those collections and links are not restored.

Working with Video



Merlin makes it easy to find video. Users may search on the Audio/Video type, or included metadata. Merlin also makes it easy to search on the spoken word. Merlin MX also

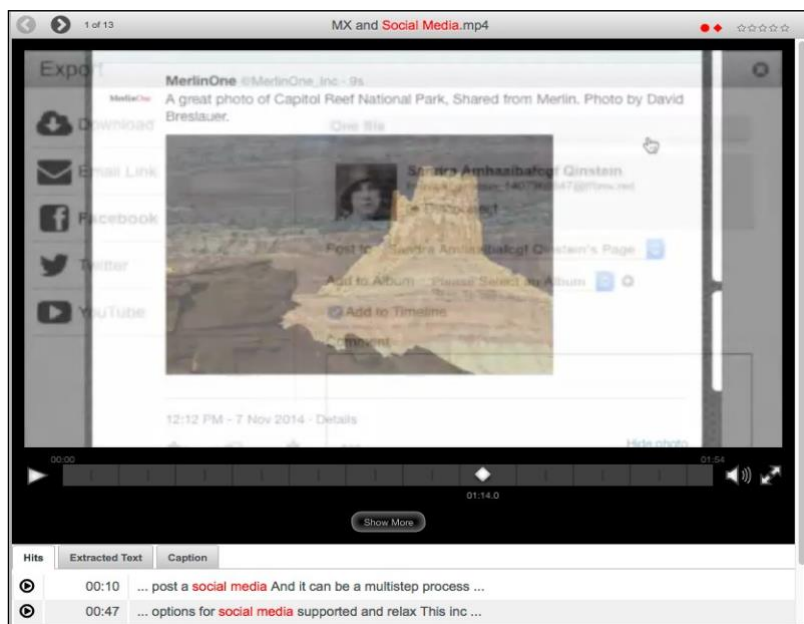
makes it possible to transcode video to other formats on download.

The Video Process

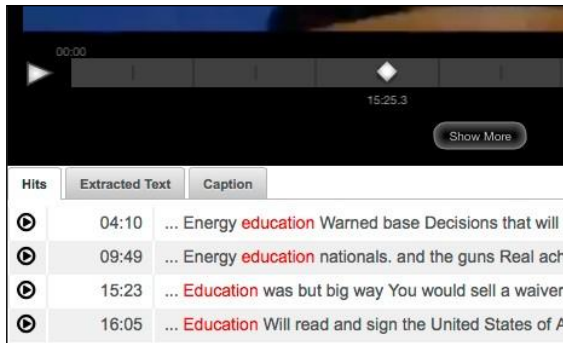
Video sent to Merlin is usually stored in the format received. Merlin also “transcodes” the video, creating a proxy file, or video thumbnail that is web friendly, making it suitable for streaming back through a web browser. Merlin also takes the audio track, does some special enhancing and then processes that through a speech-to-text process. Finally, the extracted text is synchronized with the time-code of the video making it easy to search for spoken words and go right to where the word was spoken.

Once a video is located, it may be exported to a target destination, downloaded to the desktop or shared with social media sites directly from Merlin.

In addition, video may be marked up. That is, just like in a video editing application, frames may be “Marked” and “Clips” may be created. These marked frames and clips may be tagged for searching purposes and downloaded.



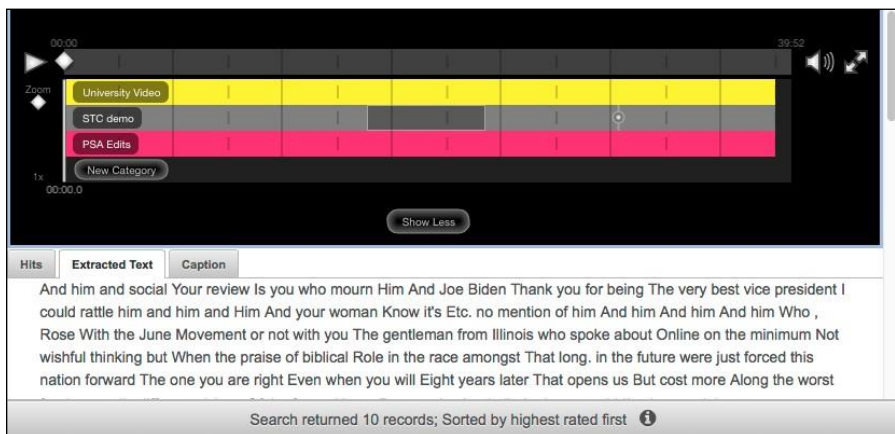
Searching Hits



Search terms show up in the “Hits” tab with the time code and a text “snippet.”

Click on any of the hits to be taken directly to that point in the video

Show More



“Show More” below the video timeline cause different categorized timelines to appear. Create a new category by clicking the “New Category” button and assign it a color code. Add a marked frame in any of the timelines with a simple mouse click.

Create a clip with a “click and drag” within the timeline.

Tagging Frames & Clips

Once a video is either “marked” or “clipped,” they may be tagged with searchable metadata. This includes both a name for the clip and a description. This information is searchable, making it even easier to find audio and video content.

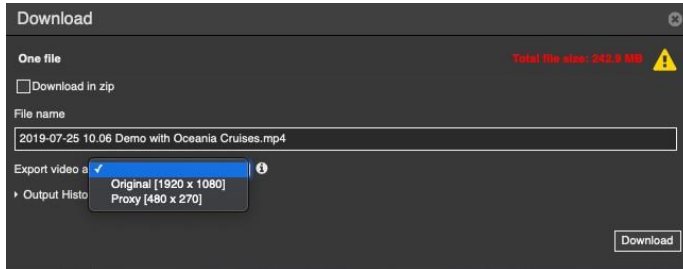


Users may select “Output” to download marked frames or clips.

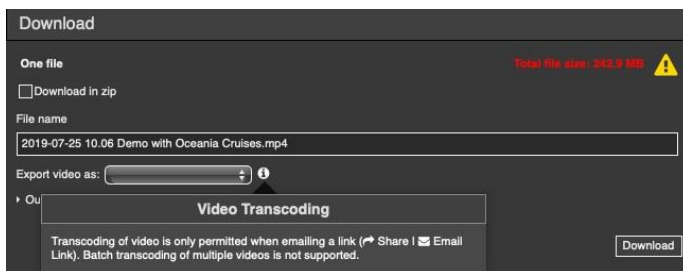
The Browser controls the download destination.

Transcoding on Download/Export

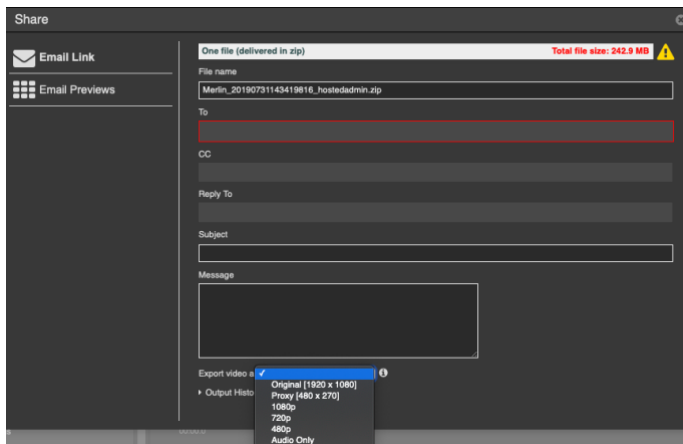
Content selected for download or export may be transcoded to other formats. Options in direct download include the original video or the “proxy” version of the video used for display and playback in the MerlinX web client.



After selecting one or more items, select “Export video as” and choose either Original (the resolution of the video is shown) or Proxy from the Download dialog. Then “Download” to complete the process



The “i” or Info button advises that other formats are available, but must be delivered by email using the Share tool to access the “Email Link” option.



The Email Link options allows video to be converted to:

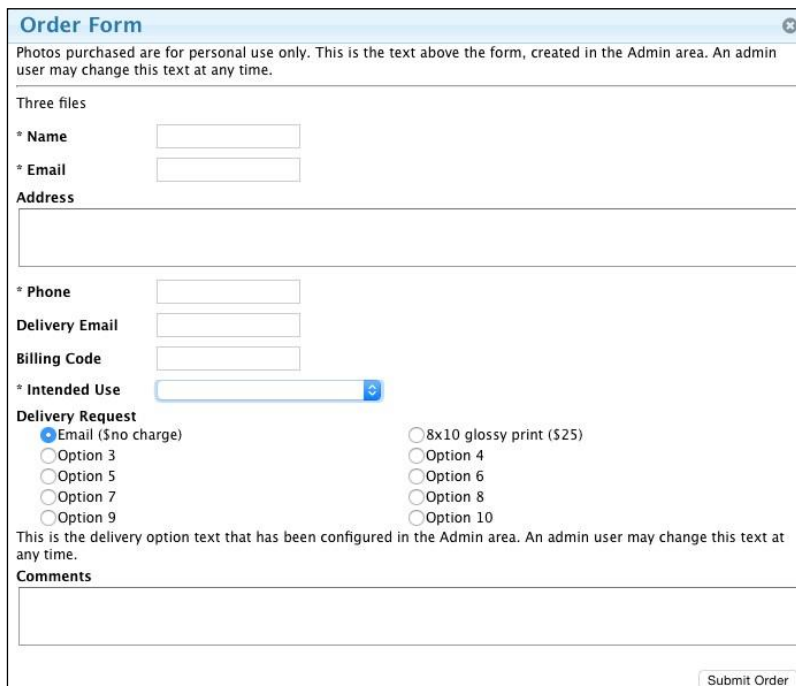
- 1080p
- 720p
- 480p
- Audio Only

Order Content

If a user belongs to a group with OrderForm selected, the download button will be replaced with a shopping cart. This holds true whether a single item download or a batch download.

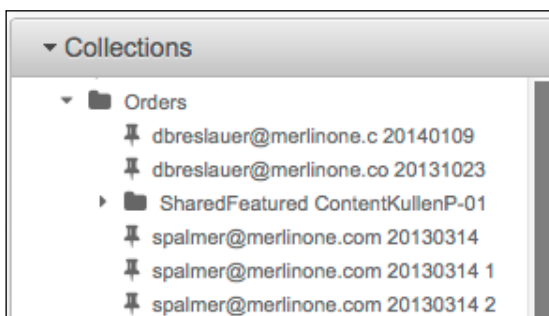


TIP: The order privilege takes priority over the download privilege regardless of other group membership making it possible to create subsets of users based on group filters that may only order content. This includes Recipient workflows as well.

A screenshot of a web form titled "Order Form". The form includes fields for Name, Email, Address, Phone, Delivery Email, Billing Code, and Intended Use. It also has a section for Delivery Request with radio button options: Email (\$no charge), 8x10 glossy print (\$25), Option 3, Option 4, Option 5, Option 6, Option 7, Option 8, Option 9, and Option 10. A "Submit Order" button is at the bottom right. A note at the top states: "Photos purchased are for personal use only. This is the text above the form, created in the Admin area. An admin user may change this text at any time." A note at the bottom states: "This is the delivery option text that has been configured in the Admin area. An admin user may change this text at any time."

A Sample Order Form

When an order is completed an email is sent to the order manager configured in the [Admin](#) area and a Collection is created to assist in order fulfillment. The Collection



appears in a shared Collection folder for members of the group "Orderadmin." The collections themselves are uniquely named and include the date string as part of their name.

Trax Integration



Integration with MerlinOne's Trax assignment request system is optional. To learn more about Trax, contact MerlinOne via the MerlinOne website at www.merlinone.com or contact a MerlinOne representative.

Trax is a web-based system that allows for the creation of assignment requests, mapping of metadata from Trax to content added to Merlin and linking of content and requests.

Opening Today's Assignments in Trax

For sites that have Trax installed, a Trax icon will appear in the main menu bar. When the system is properly configured, clicking the Trax link will take the user to "Today's Assignments in Trax."

Viewing Trax from Content

If an item in Merlin has a valid Trax assignment associated with it, the Trax ID number will appear in the Trax ID field along with a link to Trax. Clicking the Trax icon in the Trax ID field will take the user to the assignment in Trax. If the Trax field is not visible, it may be hidden.



The Trax ID field has a “Link” to the assignment in Trax and displays the Trax ID field. Note, it may appear in a different place, or may be hidden.

TIP: In a Merlin-Trax environment, the user will not need to login a second time when following a link from Merlin to Trax or from Trax to Merlin.

Workflows

This refers to workflows that are built-in to the MerlinX environment. The optional Merlin Automation Platform (MAP) has its own documentation.

Recipient Workflow

Merlin's "Recipient Workflow" allows a user to create a limited use login to present objects to someone rather than having to download and email the items, that is it allows the sharing of content with specific users without sharing everything.

Example: A user would like to release specific content to a local news organization without having to download and email a selection of content. It is possible, using the Recipient Workflow, to give an external user access to as many or as few items as desired. The recipient user may then decide what they want to order or download depending upon configuration. Recipient Workflow downloads are recorded in the same manner as downloads by standard user accounts.

Create a "Recipient User." The recipient's credential set-up must contain a usergroup that includes the "Recipient" privilege. The login username must match the value entered in the Recipient field in step 1.

Using Recipient Workflow

Users with edit metadata privileges "assigns" content to external users by editing the "recipient" field, adding the recipient user's intended login name username to the "recipient" field. Additional users may be appended; any standard delimiter is acceptable, e.g. space, comma, semi-colon.

When the user logs into MerlinX web client using their assigned username, if their usergroup is marked as "Recipient", they will be restricted to seeing only content with their username in the recipient field. There is a "filter" on their results.

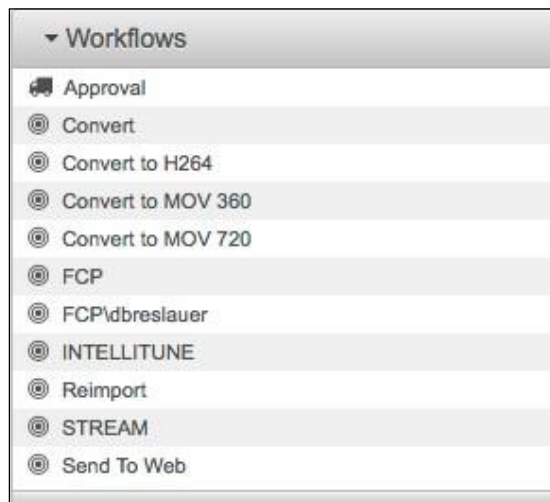
Note that because projects, linked objects and "more like this" searches do not use the "exclude" filter, these links have been removed from "Recipient" logins.

Tip: There may be more than one recipient usergroup. This allows for granular control of uploads and downloads or orders for recipient users

Output Workflows

“Workflows” palette may refer to destinations on the Merlin Server where follow-up tasks may occur. For example, export an item that is to be sent to another location by way of ftp, or reimport a file in a different format, such as a undergoing a conversion from RAW to JPEG.

Workflows may be stacked, so for example, convert a file as part of the export process and then have it sent to another remote location. Currently, to stack workflows, MerlinOne customer service will need to assist.



At the present time most drag and drop Workflows are limited to so called “Server Targets,” destinations on the Merlin server that may route content to other places for transcoding and/or delivery.

Different types of workflow targets may be represented by different icons. Typically, the “bullseye” indicates the file will be copied to a watched folder that triggers an action. The “truck” icon indicates another type of workflow.

[Approval Workflows](#)

Simple Approval

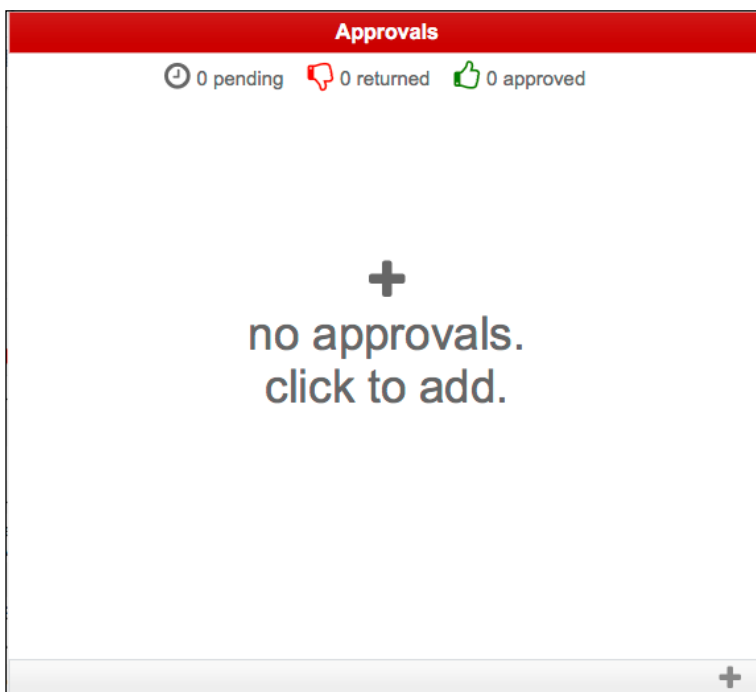
Note the “Approval” Workflow included by default, with a truck icon, in in the Workflows palette. It is an example of a drag & drop process that tags items as “approved.” This is Merlin’s “Simple Approval” workflow. It tags the “Approved” or Librarian Checked checkbox in the metadata palette to signify a simple review had occurred.

Complex Approval

For approvals that require involving others, and their review and sign-off or rejection, use Merlin’s Approval Workflow. This requires the Approval entitlement.



The “Thumbs-Up” icon in the Metadata panel allows users to start the approval process.



Click the “+” button to create a new approval request.

Approvals

New Approval Request

Description
Is this item suitable for our next cover?

Deadline 7/12/2017 1:30pm

Reviewer David B

Cancel Save

Complete the Approval Request. This may include a description, deadline time and date and the chance to pick a “Reviewer.” The reviewer must be denoted as such in their permissions.

Awaiting my approval

< Back to overview

Pending
Is this OK
Requested by David B (dbreslauer) on May 12 2017 3:14 PM
Reviewer: David B (dbreslauer) **Approved**

Comments
Add a comment
No comments

My requested approvals

1 pending 1 returned 1 approved

Approved
Is this item suitable for our next cover?
Requested by David B (dbreslauer) on July 10 2017 7:00 PM
Reviewer: David B (dbreslauer)

Pending
Is this OK
Requested by David B (dbreslauer) on May 12 2017 3:14 PM
Reviewer: David B (dbreslauer)

Not Approved
Can I get as a b&W
Requested by David B (dbreslauer) on May 11 2017 3:09 PM
Reviewer: Rande (rsimpson)

The reviewer, notified by email of pending reviews, may use the “Dashboard” to review the status of content that is or has been subject to review. The reviewer may change the status and add comments in the left panel.

Approvals

< Back to overview

Pending
Is this item suitable for our next cover?
Requested by David B (dbreslauer) on July 10 2017 7:00 PM
Reviewer: David B (dbreslauer) **Pending**

Comments
Add a comment
No comments

Pending
Approved
Not Approved

A reviewer may also click the red hand tool in the metadata palette to comment on a pending item.

Options/Admin Tools

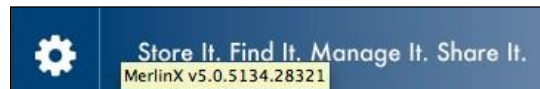
Access the options area by selecting the OPTIONS tool in the header. From here administrator users may access the controls to manage users and user groups, control display settings, run reports, and manage site preferences. Other users will only see options they are entitled to access.



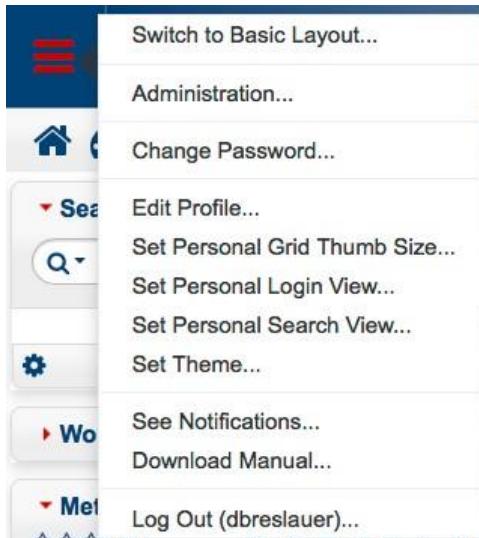
A tool-tip denotes “Options” to access the Admin area.

Merlin Version

Sometimes it is useful to know what version of the MerlinX software is running. Hover the mouse over the banner to display the version number.



Options



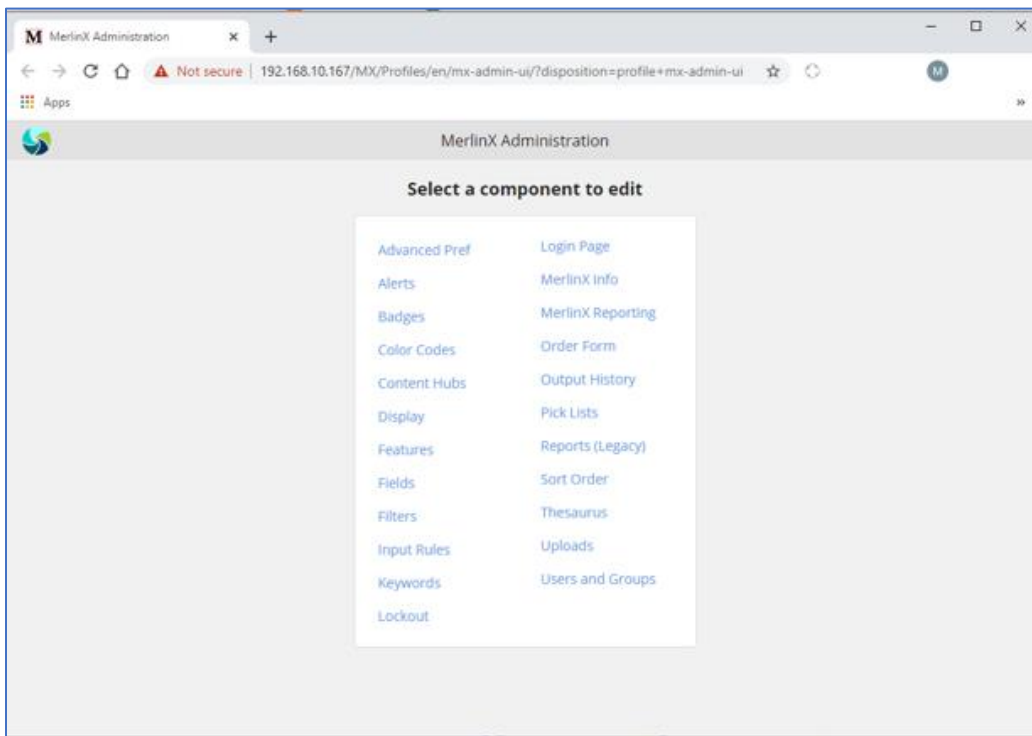
Options permit access to both the Admin area for Admin users, reports, if permission is given, and to user configurable items.

A link is provided here to download the latest version of the User Manual.

“See Notifications” allows a user to review any “growls” or messages that have appeared on screen during the session.

Administration

The Administration area is accessible by both MX and MX Basic through the options/setting menu. The Admin UI opens in a separate tab. This will allow the user to refer back to their existing session as needed while making changes.



The admin area allows an admin user to set a variety of items. These are each described in the next pages.

TIP: Some admin items are reserved for “Superadmin” users.

Advanced Prefs

This is reserved for MerlinOne staff and may only be accessed by a "Superadmin." It is recommended that this not be used except under the direct supervision of MerlinOne staff.

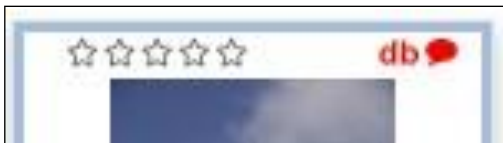
[Alerts](#)

Disable Merlin Email Alerts for search results, or delete them altogether. This is useful if employees are no longer associated with Merlin.

ID	UserName	Emails	Last Check	Last Send	Enabled	Delete	Saved Search Name	Saved Search Owner	Saved Search Description	Saved Search ViewGroups
200000072	hostedadmin	dbreslau@merlinone.com	10/23/2017 2:10 PM	10/23/2017 12:48 PM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Commented	cforber	Comment Count: GE:1;	MERLINADMIN

[Badge Config](#)

Assign custom icons based on metadata values in specific fields or rearrange stars and badges. Each side above the thumbnail may have either stars or up to four badges.



The stars upper left and the badge db assigned to the credit field with comment icon in this configuration are shown at the top of this image.

Configure badges for all users by using the group 'Default', or for..., or for specific user groups.

Badge Configuration

Settings for:

Default

Left Side:

Stars

Badges

Right Side:

Stars

Badges

1. Linked

2. Versioned

3. Commented

4.

Gallery Hover:

1. Protected

2. Rights

3. Approved

4. History

5.

6.

7.

8.

Save Settings

Reset this Group

Swap the location of Badges and Stars or set badges for both sides. If badges are configured for both sides, then Stars will not be displayed.

Control which badges are displayed.

Add an additional badge pick any field

Select the badges that appear in the Gallery hover area.

Add additional fields to the Gallery hover area

Custom Badges (12x12 pixels) may be installed on your server by MerlinOne Customer Service.

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Badge Configuration

Settings for: Default

Left Side:

☒ Stars ☐ Badges

Right Side:

☐ Stars ☒ Badges

- Linked
- Versioned
- Commented
- Credit →

Gallery Hover:

- Protected
- Rights
- Approved
- History
-
-
-
-

Value Match	Icon	
<input type="radio"/> Empty <input type="radio"/> Not Empty <input checked="" type="radio"/> Value <input type="text" value="DAVID BRESLAUER"/> <input type="checkbox"/> Match whole word	Icon File: <input type="text" value="db.png"/> or Icon: <input type="text"/>	•
<input type="radio"/> Empty <input type="radio"/> Not Empty <input checked="" type="radio"/> Value <input type="text" value="REUTERS"/> <input type="checkbox"/> Match whole word	Icon File: <input type="text" value="Reuters.png"/> or Icon: <input type="text"/>	•
<input checked="" type="radio"/> Empty <input type="radio"/> Not Empty <input type="radio"/> Value <input type="text"/> <input type="checkbox"/> Match whole word	Icon File: <input type="text"/> or Icon: <input type="text" value="circle thin"/>	•
<input type="radio"/> Empty <input type="radio"/> Not Empty <input checked="" type="radio"/> Value <input type="text" value="ASSOCIATED PRESS"/> <input type="checkbox"/> Match whole word	Icon File: <input type="text" value="ap.png"/> or Icon: <input type="text"/>	•

To add a badge to a field you may use one of the included badges, or provide custom badges. Provide the 12x12 pixel icons, preferably PNG files with transparent backgrounds, to MerlinOne Customer Service for installation on your server.

Up to four badges may be displayed on the Right and Left sides. Default badges include Linked, Versioned and Commented. Those badges may be removed if desired to make room for custom badges.

To add a new badge:

- ☐ Add the field Credit in this example to the list from the pulldown
- ☐ Save the Settings Important
- ☐ Select the new field Credit in this example
- ☐ Configure the badges on the right side
 - ☐ Select the value set empty, not empty or a specific value
 - ☐ Select the name of the icon file provided to MerlinOne customer service OR select the one of the reloaded icons Font Awesome icons
- ☐ Save the "Badge Matches"

You may need to log out and back in to see the changes.

Color Codes



Color Coding by Field Value

Settings for: Default

Color Code Fields

- Approved
- ▲ Rights Usage Terms
- Credit
- ◆ Author(Byline)

Click on shape or field to see match values set for that shape, and to modify or add values. To change the field assigned to a given shape, click on the reset icon, then select the new field from the pick list and click on the + icon to add that setting. Then click on the shape or field to set match values for that shape.

Color	Value Match	Whole?
■	REUTERS	<input type="checkbox"/>
■	AP	<input type="checkbox"/>
■	ASSOCIATED PRESS	<input type="checkbox"/>
■	DAVID BRESLAUER	<input type="checkbox"/>
■	GETTY	<input type="checkbox"/>
■	PA	<input type="checkbox"/>
■	EPA	<input type="checkbox"/>
■	AFP	<input type="checkbox"/>
■		<input type="checkbox"/>

If any settings are changed or added in this section, the current settings should be saved before changing settings for other shapes. Note, empty match values will not be applied. To match an empty or null field, use the value match "\$empty\$". To match on any non-empty and non-null value, use the value match "\$notempty\$".

Save Settings

☐ Synchronize with Merlin 5 desktop client:

The Color Codes Admin screen allows an Admin to assign shapes and colors to content. Target a shape to a specific field and a color to a specific field value. In this example, the Credit Field is assigned a “square.” Different values that may appear in the credit field are assigned a color, e.g. Reuters = Turquoise, EPA = Red, etc.

When this is configured, content will display a colored shape that represents the value in the defined field for “at-a-glance” recognition.

TIP: Enter the value \$empty\$ to match an empty or null field. Use \$notempty\$ to match a field that is not empty.

Use the check box at the bottom of the screen to sync the values either to or from the M5 rich client If M5 has been deployed. If M5 is being used and Color codes have been implemented, they may be “retrieved” from the M5 settings. Color codes may also be configured using MerlinX and exported to the M5 client with the exception of the "empty/not empty" option.

Display

The display settings configuration allows an admin user to set thumbnail sizes, the maximum number of hits retrieved in a search, the default login view and the featured content page. Note that these setting may be assigned as the default for all groups, or to specific groups.

Select usergroup to update settings: Default

Configuration	Min	Max	Current Value	Set Value
Gallery Thumb Size: (max dimension in pixels)	128	256	128	<input type="text" value="128"/>
Gallery Text Field: (text field below gallery thumb)			Title	<input type="text" value="No change"/>
Gallery Date Field: (date field below gallery thumb)			Date Created	<input type="text" value="No change"/>
List Thumb Size: (max dimension in pixels)	128	256	192	<input type="text" value="192"/>
Max No. Search Hits:	50	5000	5000	<input type="text" value="5000"/>
Search View:			Gallery	<input type="text" value="No change"/>
Application Mode:			default	<input type="text" value="No change"/>
Login View:			savedsearch	<input type="text" value="No change"/>
Featured Photo (set Merlin ID):			47348149	<input type="text" value="47348149"/>
Featured Content Text Block:	<p>(limited HTML capabilities, refer to the manual, max 2000 char):</p> <pre><h1><a>Welcome to our Featured Content.</h1> <h3>By accessing this system, the user agrees to our terms and conditions which may be found here.</h3> This custom text block may be edited by the system admin. It supports simple html so that you may easily

 create lists
set type in bold or <i>italics</i>

 it is easy to set projects as Featured Collections. They simply must be in a shared project folder named Featured Content. To create Featured Searches, create a shared search folder named Featured Content
To return to this page, click the "star" icon in the main tool bar.</pre>			

Save Settings

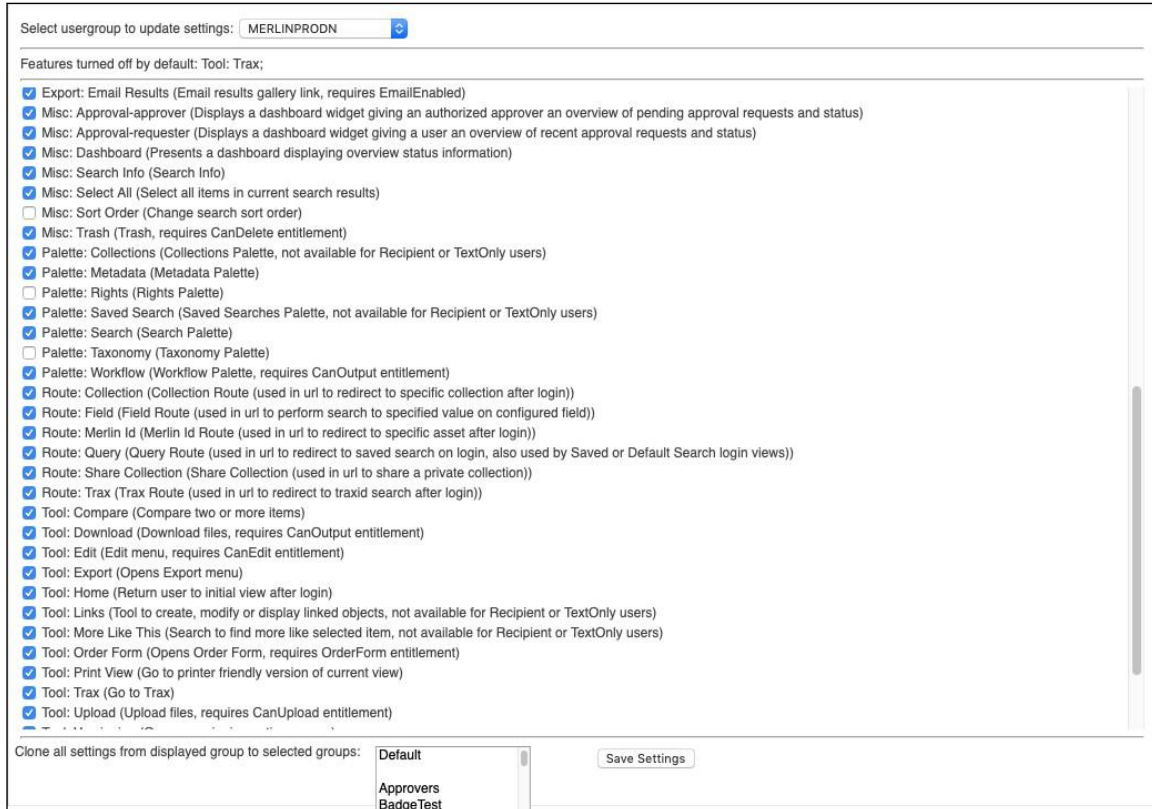
Other Display options include the view (Gallery, List, Single) used after a search, what should be displayed upon login (Login View) and the Application Mode; that is should the default view be the MerlinX UI or the new MerlinX Basic UI.

The Featured Content area is configured by noting a featured content image, creating text for the Featured Content feature, and adding content to a Collection or Search Folder labelled Featured Content. Featured Content Page text may be entered here using simple HTML formatting tags. These formatting tags: bold ``, italics `<i>`, etc., must be followed with a close command for each open command, e.g. ``, `</i>`. Scripts and tables are not supported.

HTML Tag	Description
<code></code>	Defines <code></code> bold <code></code> text
<code></code>	Defines emphasized text
<code><i></code>	Defines a part of text in an alternate voice or mood
<code><small></code>	Defines smaller text
<code></code>	Defines important text
<code><sub></code>	Defines subscripted text
<code><sup></code>	Defines superscripted text
<code><mark></code>	Defines marked/highlighted text
<code>
</code>	Line Break (does not require a close)

Features

Turn off palettes and other features with this Super Admin function.



Select usergroup to update settings: MERLINPRODN

Features turned off by default: Tool: Trax;

- ☒ Export: Email Results (Email results gallery link, requires EmailEnabled)
- ☒ Misc: Approval-approver (Displays a dashboard widget giving an authorized approver an overview of pending approval requests and status)
- ☒ Misc: Approval-requester (Displays a dashboard widget giving a user an overview of recent approval requests and status)
- ☒ Misc: Dashboard (Presents a dashboard displaying overview status information)
- ☒ Misc: Search Info (Search Info)
- ☒ Misc: Select All (Select all items in current search results)
- ☐ Misc: Sort Order (Change search sort order)
- ☒ Misc: Trash (Trash, requires CanDelete entitlement)
- ☒ Palette: Collections (Collections Palette, not available for Recipient or TextOnly users)
- ☒ Palette: Metadata (Metadata Palette)
- ☐ Palette: Rights (Rights Palette)
- ☒ Palette: Saved Search (Saved Searches Palette, not available for Recipient or TextOnly users)
- ☒ Palette: Search (Search Palette)
- ☐ Palette: Taxonomy (Taxonomy Palette)
- ☒ Palette: Workflow (Workflow Palette, requires CanOutput entitlement)
- ☒ Route: Collection (Collection Route (used in url to redirect to specific collection after login))
- ☒ Route: Field (Field Route (used in url to perform search to specified value on configured field))
- ☒ Route: Merlin Id (Merlin Id Route (used in url to redirect to specific asset after login))
- ☒ Route: Query (Query Route (used in url to redirect to saved search on login, also used by Saved or Default Search login views))
- ☒ Route: Share Collection (Share Collection (used in url to share a private collection))
- ☒ Route: Trax (Trax Route (used in url to redirect to traxid search after login))
- ☒ Tool: Compare (Compare two or more items)
- ☒ Tool: Download (Download files, requires CanOutput entitlement)
- ☒ Tool: Edit (Edit menu, requires CanEdit entitlement)
- ☒ Tool: Export (Opens Export menu)
- ☒ Tool: Home (Return user to initial view after login)
- ☒ Tool: Links (Tool to create, modify or display linked objects, not available for Recipient or TextOnly users)
- ☒ Tool: More Like This (Search to find more like selected item, not available for Recipient or TextOnly users)
- ☒ Tool: Order Form (Opens Order Form, requires OrderForm entitlement)
- ☒ Tool: Print View (Go to printer friendly version of current view)
- ☒ Tool: Trax (Go to Trax)
- ☒ Tool: Upload (Upload files, requires CanUpload entitlement)

Clone all settings from displayed group to selected groups: Default

Approvers
BadgeTest

Save Settings

Note that for the select user group (Merlinprodn) that the Trax tool is turned off by default for all groups. Additionally, other features have been disabled by unchecking the feature.

Manage the features for all users by selecting “Default” as the user group. Manage the features for individual groups by deselecting them on a per-group basis.

Note that User group entitlements take precedence over features. Therefore, not allowing the “Delete” entitlement for a user group will remove it regardless of the setting in the Features area.

Fields

Admin users may re-label fields and configure where they appear and whether they are editable from this page.



Using Default Master Settings allows the SuperAdmin user to create a baseline from which all other group settings will be managed. Default Master Settings may be accessed only by a Super Admin user.

Select usergroup to update settings: Default master settings																	
Database Field	Field Label	Field Description	Search?	Search Type	Full-text Indexed?	Display?	Display Order	Non-Text-Only Display?	Text-Only Display?	Text Display Order	Edit?	Edit Type	Upload?	Upload Type	Upload Req'd	Upload Order	System Column?
AUDIOLANG	AUDIOLANG						10101			10101							
AUTOTAGS	AutoTags		<input type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	40			10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text		101	
AUXTEXT	AUXTEXT		<input type="checkbox"/>				10101			10101	<input type="checkbox"/>						
BITFLAGS	BITFLAGS		<input type="checkbox"/>				10101			10101	<input type="checkbox"/>						
BYTITLE285	Creator Title		<input type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	100			10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text		0	
CAPT1210	Description	Caption	<input checked="" type="checkbox"/>	Enforced List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10101			10101	<input checked="" type="checkbox"/>	Enforced List	<input checked="" type="checkbox"/>	Enforced List		28	
CAPWR122	Caption Writer		<input type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10101			10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text		0	
CATEGORY15	Category		<input type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	140			10101	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Text		16	
CIBYLINE280	Creator (Byline)	Author or Creator	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	90			30	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Text		8	
CDABLE	CDABLE		<input type="checkbox"/>				10101			10101	<input type="checkbox"/>						
CIMAGEO	Merlin ID		<input checked="" type="checkbox"/>	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	280			10101	<input type="checkbox"/>		<input checked="" type="checkbox"/>				
CITY280	City		<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	180			10101	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Text		22	
KEYWORDS	Keywords	Type ahead list	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	40			60	<input checked="" type="checkbox"/>						
CLIPTYPE	CLIPTYPE		<input type="checkbox"/>				10101			10101	<input type="checkbox"/>						
COBJECT205	Title		<input type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	30			10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text		0	
CODEC	CODEC		<input type="checkbox"/>				10101			10101	<input type="checkbox"/>						
COLORBG	Background Color		<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10101			10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text		101	
COLORFG	Foreground Color		<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10101			10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text		101	

Field Options

An admin user may select fields and their behavior to appear in the following palettes, forms or views:

- ☐ Search
- ☐ Metadata
- ☐ Editing
- ☐ Rights Management
- ☐ Upload and whether it is mandatory.
- ☐ Whether fields are displayed with non-text objects or text objects

The default field order for the metadata and web upload palettes may be set here. When setting the display order, it is by numerical rank. By spacing them 10 apart by default, it is easy to move an item to appear between another two items. “10101” puts the items at the bottom of the list. They will still be displayed unless set to unchecked or never.

TIP: The screen displayed above is for “super admin” users and allows more granular control. The “super admin” sets the rights that a lower admin may work with Default Master Settings.

These lists may be set as a default for all groups recommended or for individual groups.

So it is possible to give a group edit privileges, but only give the group one or two field to edit by way of this configuration.

The Search type may be set to:

Number

Text

Picklist –Single or Multiple Value-Enforced or unenforced
see the section on Picklists for more information

Setting for Groups

Select usergroup to update settings:

Database Field	Override Default	Field Label	Search?	Search Type	Full-text Indexed?	Display?	Display Order	Edit?	Edit Type	Upload?	Upload Type	Upload Req'd	Upload Order
ARCHIVEDDT	<input checked="" type="checkbox"/>	Archived Date	<input type="checkbox"/>			<input type="checkbox"/>	10101	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	0
ARCHIVIST	<input checked="" type="checkbox"/>	Archivist	<input type="checkbox"/>			<input type="checkbox"/>	10101	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	0
BYTITLE285	<input checked="" type="checkbox"/>	Byline Title	<input type="checkbox"/>	Text		<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	0
CAPT2120	<input checked="" type="checkbox"/>	Caption	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	28
CAPWR122	<input checked="" type="checkbox"/>	Caption Writer	<input type="checkbox"/>	Text		<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	0
CATEGOR215	<input checked="" type="checkbox"/>	Category	<input type="checkbox"/>	Text		<input checked="" type="checkbox"/>	140	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	16
CBYLINE280	<input checked="" type="checkbox"/>	Byline	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	90	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	8

Select the group to be edited. In this example, the user group Demo2 has been selected and then the fields which are going to be configured differently have been indicated with the Override Default checkbox. This allows individual groups to have different values from one another. So it is possible for one group to have different labels, another to have different fields used for display, searching or upload.

Web Upload Form

The Fields configuration page allows an admin user to select the initial set of fields available in the Web Upload form, their order as well as which fields are mandatory.

page It. Shore It. MerlinX
DIGITAL ASSET MANAGEMENT

Administration

Select usergroup to update settings: Default

Database Field	Field Label	Search?	Search Type	Full-text Indexed?	Display?	Display Order	Edit?	Edit Type	Upload?	Upload Type	Upload Req'd	Upload Order
BYTITLE285	Byline Title	<input type="checkbox"/>	Text		<input checked="" type="checkbox"/>	100	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CAPT2120	Caption	<input type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	1
CAPWR2122	Caption Writer	<input type="checkbox"/>	Text		<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CATEGOR215	Category	<input checked="" type="checkbox"/>	Text		<input checked="" type="checkbox"/>	140	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CBYLINE280	Byline	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	90	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	10
CIMAGEID	Merlin ID	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	280	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	101
CITY290	City	<input checked="" type="checkbox"/>	Text		<input checked="" type="checkbox"/>	150	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY1	CKEY1	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY2	CKEY2	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY225	CKEY225	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY3	CKEY3	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY4	CKEY4	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY5	CKEY5	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY6	CKEY6	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY7	CKEY7	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101
CKEY8	CKEY8	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	10101	<input checked="" type="checkbox"/>	Text	<input type="checkbox"/>	Text	<input type="checkbox"/>	101

Save Settings

Admin users without “Super Admin” privileges will still be able to modify fields that the “super admin” has allowed. Note that this Admin user will only be allowed to set already viewable items to be hidden or shown.

Field Behavior

CAPWRI2122	Caption Writer	Unchecked	Text
CATEGOR215	Category	Checked	Text
CBYLINE280	Author(Byline)	Checked	Enforced List
CDABLE	CDABLE		Enforced List (multiple)

☒ Unenforced List
☐ Unenforced List (multiple)

Fields may be set to be free text entry or lists. Lists may be enforced or unenforced. They may also be set as multiple values; that is a user may select more than one item from the list. Lists are configured in the [PickList](#) area.

Clone Settings

A set of field configurations may be copied from one group to another. Once a group's settings have been saved, with them selected above, select one or more groups in the area at the bottom of the page and then modify the group settings as needed and "Save Settings."

Set these groups to same settings as group shown:

Ad_Design
ADG
angle
Approved_Only

Save Settings

IPTC/XMP Fields

Merlin supports IPTC/XMP fields. These are the fields found in Photoshop's "File Info" area and in information that may be embedded in files by default so that information travels with the file. Fields like Description (Caption) and Author (Byline) are examples of those fields See the IPTC website (<https://iptc.org/standards/photo-metadata/>) for in-depth information.

BYTITLE285	i
CAPT2120	i
CAPWRI2122	i
CATEGOR215	i
CBYLINE280	i
CDABLE	
CIMAGEID	

Merlin notes the IPTC fields in the Fields Admin area with the "i" icon, with the tool tip "IPTC/XMP field that will be read on input and updated on export/output."

Filters

Adds a filter to a user or user group that enables only specified content for download or edit, even though other content may be viewed or edited. This configuration area is only available to members of the SuperAdmin group.

Administration					
Add	Filter Type	User	Group	Filter (SQL where string) *	Validate**
	<input checked="" type="radio"/> Download <input type="radio"/> Edit	<input type="text"/>	<input type="text"/>	<input type="text"/>	Count <input type="text"/>
	<input checked="" type="radio"/> Download <input type="radio"/> Edit	<input type="text"/>	<input type="text"/>	<input type="text"/>	Count <input type="text"/>
<input checked="" type="radio"/>	<input type="radio"/> Download <input type="radio"/> Edit	<input type="text"/>	<input type="text"/>	<input type="text"/>	Count <input type="text"/>
Contact info to remove restriction <input type="text"/>					
<input type="button" value="Save"/>					
<small>*Only items where the filter evaluates as true will be allowed to be edited, downloaded or output. To delete a filter, clear the filter string but leave the type, user and group values. **All filters, including blank ones, must be validated in order to be able to save the form.</small>					

To Create a new Filter:

- ☐ Select the behavior; Download or Edit
- ☐ Complete the form by either selecting a specific user or a user group
- ☐ Create a filter see below for examples
- ☐ Validate the filter by selecting Count
- ☐ Add the email address and message of the person to contact with questions regarding those specific items optional
- ☐ Click Save.

Filters are based on metadata values entered in specific fields using "SQL where clause" format. Use the actual database field name not the label. See the Fields Admin page for that information.

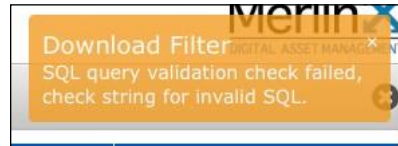
```
cimageid<>523970
cservice13<>'restricted'
cbyline280='David Breslauer'
Indate>='2014-10-15'
```

Filters may be strung together
(librarian=1 or rights1=1) and cservice13<>'restricted'

When more than one filter is associated with a user and/or group "AND" is presumed...all the filters would be in effect.

If a download filter does not validate, an advisory message appears.

TIP: Check the “Fields” admin area to see the internal field name as used by the server when configuring download filters. You will also see the field type date, logical, text in addition to the labels associated with the fields.



If an error is encountered in creating the filter, a “growl” or message will appear.

Using Filters

Filters may be inclusive or exclusive, depending upon how they have been created.

In this example above a user would only be able to download content where the byline was David Breslauer. filter is: cbyline280='david breslauer'

In this example, the user would NOT be allowed to edit content where the byline was David Breslauer. filter is: cbyline280<>'david breslauer'

If a user selects content they are not entitled to download, they will receive the following message:



The user will be permitted to download the other files.

Removing a Filter

To remove a filter, delete the filter string, and then revalidate all of the existing filters including the one with the deleted string. Then Save.

Input Rules

This user interface for Super Admin users allows for the configuration of rules, such as adding expiration dates to content, or protecting content at the time of input. It also allows for the import of existing rules that were created directly on the server so they may be managed here.

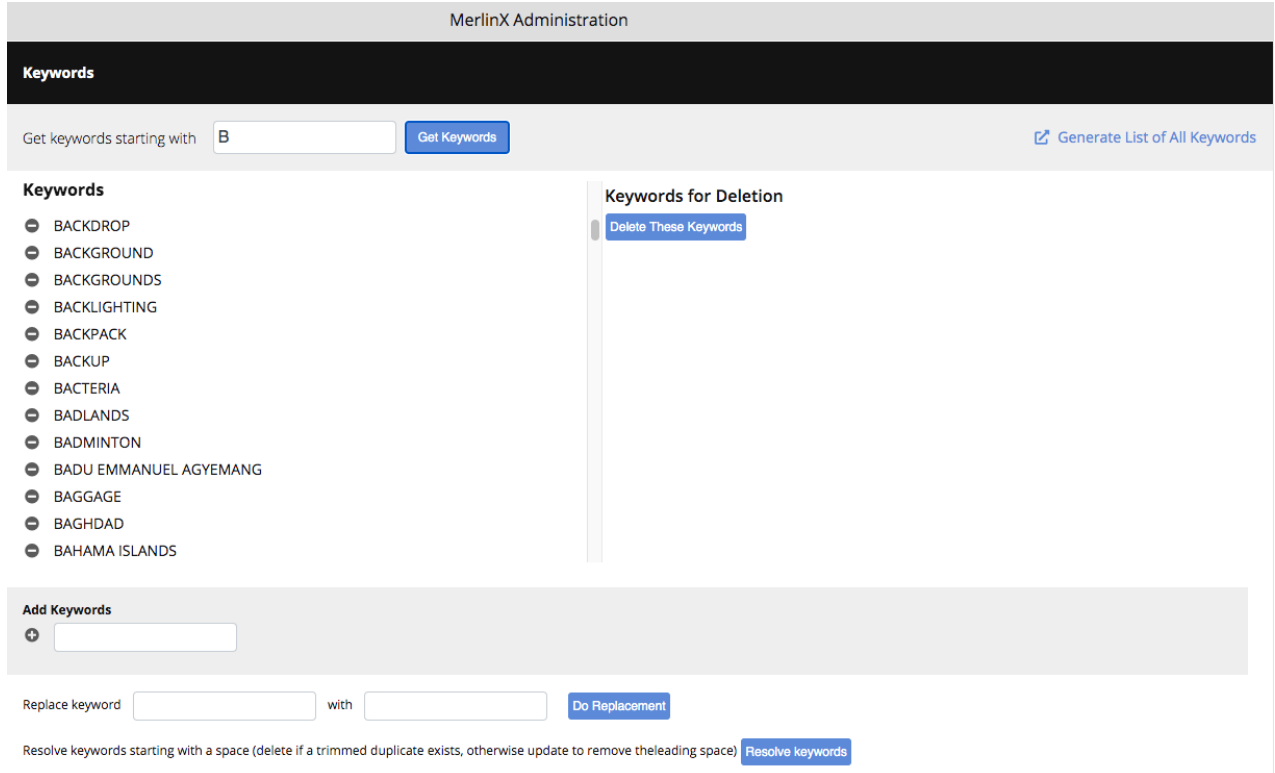
The screenshot shows a web-based configuration interface for rules. On the left, under the heading "Rules:", there is a list of rules. The first rule is "CREDIT2110 ? AP, CREDIT2110 ?" with a sub-item "Associat". Below it is a "Default" rule. The main area on the right is for configuring a rule. It starts with an "If:" section containing two conditions: "Credit" equals "David Breslauer" and "Creator Title" not equal "Staff". Below this is a "Then:" section with four radio button options: "Protect", "Set expiry to 90 days" (which is selected), "Leave unprotected, no expiry", and "Reject". At the bottom of the configuration area are two buttons: "Save New Rule" and "Import from merlin4.ini". At the very bottom of the interface is a "Notes:" section with a text input field and a "Save notes only" button.

In the example shown, a new rule is that if the Credit Field = “David Breslauer” AND the Creator Title does not equal = “Staff” then the content should be marked To Expire in 90 days.

To import existing rules, use the “Import from merlin4.ini” button.

Keywords

Keywords may be managed from this administration screen. Add new keywords, remove keywords or update keywords from this area.



The screenshot shows the 'MerlinX Administration' interface for managing keywords. At the top, there's a header 'MerlinX Administration' and a sub-header 'Keywords'. Below the header, there's a search bar with the text 'Get keywords starting with' followed by a text input field containing 'B'. To the right of the input field is a blue button labeled 'Get Keywords'. Further right is a link 'Generate List of All Keywords'. Below the search bar, there are two columns. The left column is titled 'Keywords' and contains a list of keywords, each preceded by a minus sign button: BACKDROP, BACKGROUND, BACKGROUNDS, BACKLIGHTING, BACKPACK, BACKUP, BACTERIA, BADLANDS, BADMINTON, BADU EMMANUEL AGYEMANG, BAGGAGE, BAGHDAD, and BAHAMA ISLANDS. The right column is titled 'Keywords for Deletion' and contains a blue button labeled 'Delete These Keywords'. At the bottom of the screen, there's a section for adding and replacing keywords. It includes a text input field with a plus icon, a 'Replace keyword' section with two text input fields and a 'Do Replacement' button, and a 'Resolve keywords' section with a text input field and a 'Resolve keywords' button.

Find your keywords by entering the starting letters at the top of the screen. For example, if you want to see keywords that start with B, enter B and then click “Get Keywords.”

Add keywords using the “Add” area at the bottom of the list.

This adds a keyword to the list for data entry purposes. It does not add the keyword to any content.

Remove keywords by using the “minus” button to add them to the list for deletion on the right side.

This both removes the keyword from the list AND removes it from any content where it may exist.

Replace keywords “this” for “that” using the bottom “Replace Keyword” area. This removes the keyword from the master keyword list, and replaces it with a new keyword or an existing keyword combining them. It also updates any content with the existing keywords replacing it with the new keyword entry.

Generate Keyword List

Create a list of all keywords for export or reference by clicking the “Generate List of All Keywords” on the upper right of the screen.

This opens a new browser tab and generates a list of keywords that may be saved or printed.

Lockout

Users and IP addresses get temporarily locked out for 15 min on 5 failed logins by default. If there are further login attempts during that 15 minute period, the user is banned.

This Admin UI allows an admin user to add or remove lockout/ban settings.

Administration							
Action	UserName	IP Address	Current Failure Count	White List?	Locked Out?	Banned?	Last Failed Login
Delete this entry		107.137.240.87	0	false	false	false	8/18/2015 8:40 AM
Delete this entry		108.203.44.16	0	false	false	false	9/9/2015 2:57 PM
Delete this entry		170.149.100.10	0	false	false	false	8/27/2015 4:47 PM
Add/update entry	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Delete an entry to unlock a user or IP address or add an entry to blacklist a user or IP.

Defaults are 5 failures for an individual user, 20 for an IP address and 15 minutes. Each of those settings can be configured.

Login Page Settings



Merlin's Login page may be customized with a banner, new photos and custom text. To create a login page for Merlin:
Put a banner and four pictures in Merlin that match the sizes required for the banner or the aspect ratio of the screens expected to access Merlin. 2000 pixels across is typically more than adequate.

Make a note of the Merlin IDs and enter the Merlin IDs into the appropriate space. Enter text; use simple HTML to set content to bold or italics or a color

TIP: Many Merlin sites change their login photos monthly.

Login Page Items

Banner 1024px X 112px

The remaining photos should be horizontal and be large enough to not pixilate and small enough to load quickly. 1020 x 640 pixels would be the minimum recommended size.

It is possible to enter in only one item, such as just the banner. In that case, the default items will be used for the remaining items.

To create a custom login page for each department or group, contact MerlinOne Customer Service for assistance.

MerlinX Info

This Super Admin feature provides information about the server software version for several components.

Database Info	
UpdateDate	8/28/2020 1:55:22 PM
Type	UDemo_Merlin X 6.0
Revision Number	181
Revision Date	6/17/2020 10:01:33 AM

General Info	
MerlinX Version	6.1.7.3535 (3535)
Search Engine Version	5.6.21
Content Hub Version	1.0.0.229
MX Admin UI Version	6.5.0.267
MX Reporting Version	1.1.0.2258
Server Name	MDEMO3

Order Form



configured to provide users with an order option instead of a Merlin may be

download option. When that is the case, users will be presented with a shopping cart icon in the main tool bar.



In order to be presented with the shopping cart/order icon, the user simply must belong to a group where "OrderForm" has been enabled.

The user may belong to other groups, but the Order privilege will override any download privileges.

Order FormFeature	What it does
Enabling the feature	Turns the feature on
The contact name	Lists contact name
Email orders to:	Email Address of Primary person
Audit Email to:	Email of billing dept. for example
Email From: (warning, check with Merlin support or local support before changing this email address):	The return address in the email
Up to ten delivery options with pricing information	
Delivery option text-limited to 200 characters which appears below the delivery options, may be set to blank	Using simple html, this is the text that appears with the delivery options.
Text that appears above the form on the order form page-limited to 2000 characters.	Using simple html, this is the text that appears at the top of the order request.
Intended Use Picklist	Leave Blank if not required. Separate Picklist items with a semi-colon ;.
Order Collection Name Over-Ride Check the Box to change the behavior.	Orders are sorted in the Order collection folder alphanumerically. This controls whether the user name or date appears first.

Mandatory Fields

Select the required information

TIP: Simple HTML may be used in the “Delivery Option Text” and “Text above form.” This includes basic format tags for bold, underline italics. It is important to remember to “close” html tags.

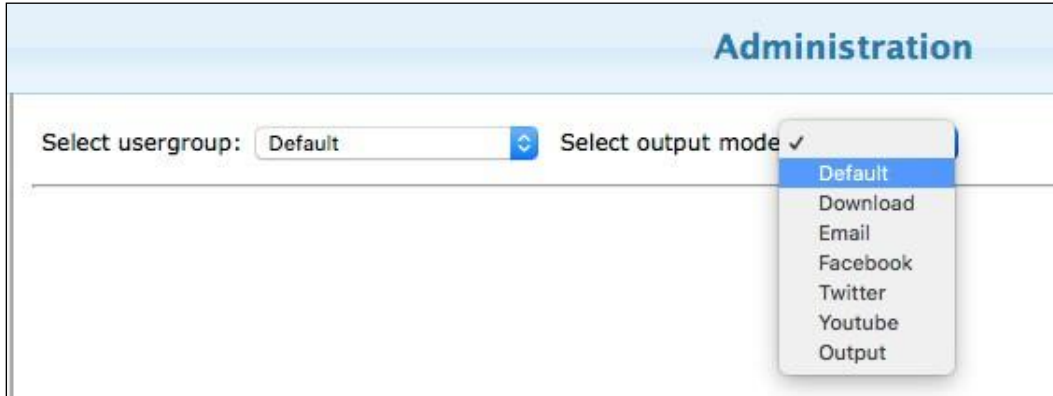
Leave items empty if you do not wish for them to appear in the form.

Order Form Configuration

Configuration	Current Value	Set Value
Enabled?	Yes	<input checked="" type="radio"/> Yes <input type="radio"/> No
Contact Name (optional):	David Breslauer	<input type="text" value="David Breslauer"/>
Email Orders to:	dbreslauer@merlinone.com	<input type="text" value="dbreslauer@merlinone.com"/>
Audit Copy to (optional):	rsimpson@merlinone.com	<input type="text" value="rsimpson@merlinone.com"/>
Email from (warning, check with Merlin support or local support before changing this email address):	demo@merlinone.net	<input type="text" value="demo@merlinone.net"/>
Delivery Options, max 10, leave blank if fewer required, at least one MUST be configured:		
Delivery Option 1, Label:	Email (\$no charge)	<input type="text" value="Email (\$no charge)"/>
Delivery Option 2, Label:	8x10 glossy print (\$25)	<input type="text" value="8x10 glossy print (\$25)"/>
Delivery Option 3, Label:	Option 3	<input type="text" value="Option 3"/>
Delivery Option 4, Label:	Option 4	<input type="text" value="Option 4"/>
Delivery Option 5, Label:	Option 5	<input type="text" value="Option 5"/>
Delivery Option 6, Label:	Option 6	<input type="text" value="Option 6"/>
Delivery Option 7, Label:	Option 7	<input type="text" value="Option 7"/>
Delivery Option 8, Label:	Option 8	<input type="text" value="Option 8"/>
Delivery Option 9, Label:	Option 9	<input type="text" value="Option 9"/>
Delivery Option 10, Label:	Option 10	<input type="text" value="Option 10"/>
Delivery Option Text (limited HTML capabilities, refer to the manual, max 200 char):		
Current text: This is the delivery option text that has been configured in the Admin area. An admin user may change this text at any time.		
<input type="text" value="This is the delivery option text that has been configured in the Admin area. An admin user may change this text at any time."/>		
Text above form (limited HTML capabilities, refer to the manual, max 2000 char):		
Current text: Photos purchased are for personal use only. This is the text above the form, created in the Admin area. An admin user may change this text at any time.		
<input type="text" value="Photos purchased are for personal use only. This is the text above the form, created in the Admin area. An admin user may change this text at any time."/>		
Intended Use PickList (if not required, leave blank. Separate pick list items with semi-colons):		
Current list: Intended use 1; Intended use 2, Intended use 3		
<input type="text" value="Intended use 1; Intended use 2, Intended use 3"/>		
Order Collection Name Override: (Orders are sorted alphabetically. Default order name is: [date] [requestor email])		
<input type="checkbox"/> Check the box to name: [requestor email] [date]		
Mandatory Order Form Fields:		
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Address
<input checked="" type="checkbox"/> Phone	<input type="checkbox"/> Delivery Email	<input type="checkbox"/> Billing Code
<input checked="" type="checkbox"/> Intended Use	<input type="checkbox"/> Delivery Request	<input type="checkbox"/> Comments
<input type="button" value="Save Settings"/>		

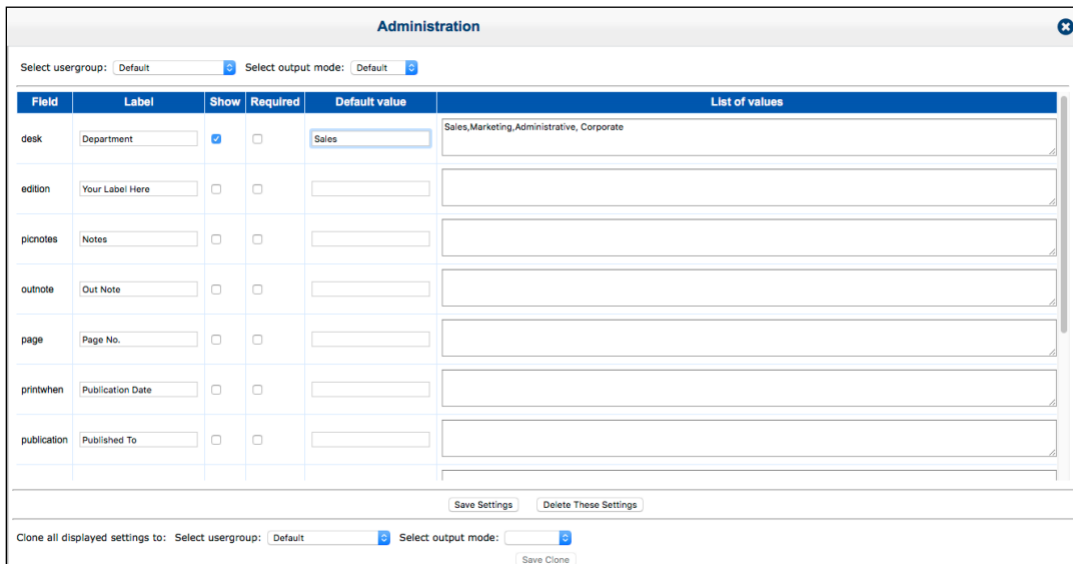
Output History

Configure Output History requirements here. This may include creating separate “Output History” forms for each export/download/output type. Manage labels, fields shown or hidden, required, default values and picklists from here.



The screenshot shows the 'Administration' section of the software. It features two dropdown menus: 'Select usergroup:' with 'Default' selected, and 'Select output mode:' with a dropdown menu open showing options: 'Default', 'Download', 'Email', 'Facebook', 'Twitter', 'Youtube', and 'Output'.

As with most other Admin functions, these settings may be for all users and groups, configured by selecting the user group 'Default', or may be set differently for a specific user group. Additionally, different output modes may have different fields, labels, default values and Picklists.



The screenshot shows the 'Administration' section with a table for configuring fields. The table has columns: Field, Label, Show, Required, Default value, and List of values. The 'desk' field is currently configured with 'Department' as the label, 'Sales' as the default value, and a picklist of 'Sales,Marketing,Administrative, Corporate'.

Field	Label	Show	Required	Default value	List of values
desk	Department	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales	Sales,Marketing,Administrative, Corporate
edition	Your Label Here	<input type="checkbox"/>	<input type="checkbox"/>		
picnotes	Notes	<input type="checkbox"/>	<input type="checkbox"/>		
outnote	Out Note	<input type="checkbox"/>	<input type="checkbox"/>		
page	Page No.	<input type="checkbox"/>	<input type="checkbox"/>		
printwhen	Publication Date	<input type="checkbox"/>	<input type="checkbox"/>		
publication	Published To	<input type="checkbox"/>	<input type="checkbox"/>		

















At the bottom, there are buttons for 'Save Settings', 'Delete These Settings', and a 'Clone' section with 'Clone all displayed settings to:' followed by 'Select usergroup:' (Default) and 'Select output mode:' (Default), with a 'Save Clone' button.

Once the user group and mode is selected (Default for both is the selection in this screen shot), add Labels, choose to show the field, mark it as Required and add default values or create a Picklist for the field; separating the values with a comma. Use the “Clone” control at the bottom to copy one setting to other groups or modes.

Picklists

Manage field specific Picklists (controlled vocabularies) here. Create new picklists or manage existing ones. Picklists may be associated with all groups or may be associated with specific user groups. Also, it is possible to determine whether a picklist is being used for the upload form, the metadata view, searching, or all three.

Administration

Group	Field	Usage	Type	Values	
default	State/Province		Static	239	 
default	Country		Static Enforced	160	 
default	Language		Static	19	 
default	Rights Usage Terms	Upload	Static	5	 
default	Location		Static	7	 
default	Approval Required		Static	3	 
default	Custom		Static	4	 
approved only	Column Name		Static	4	 

Group

default

Field

Rights Usage Terms

Usage

Upload

Type

☒ Static ☐ Dynamic

Values

Approved for External Use

Approved for External Use, Editorial Use Only

Approved, for External Use, No Restrictions

Internal Use, Editorial Use Only

Internal Use, No Restrictions

Clear Form

Clone all lists from Source group to selected Target groups:

Source:

default
approved only
approver
Basic

Target:

default
approved only
approver
Basic

Create Cloned Lists

Picklists may be static or dynamic. In either case, the list may be “enforced,” that is the user **MUST** pick from the list. Also, lists may be multi-value.

Picklists that are already created will appear in the top half of the screen. Their current configuration is displayed.

The bottom area is designed to modify the values of an existing list, or to create a new list by clicking “Create New List”

Type refers to Static or Dynamic. Dynamic list values are created from existing values in the database. In either case, if the list is enforced, users **MUST** pick a value from the created list. To refresh a dynamic list, select it from the list of lists at the top and click “Save List.”

Group: Select who should see the list.

Usage: Where the picklist is used

Type: whether a picklist is static or dynamic and whether or not it is enforced

Values: Currently configured values and the values for the list Values use the plus button to add new values

IMPORTANT: Picklists require they be created AND implemented in the “Fields” admin area.

TIP: To edit a dynamic list first create the dynamic list, save it and then change it to static. This will create an editable list. It is a great way to find typos in your field values. You may also generate a “Distinct Value” report to see values that already exist in a field.

The area on the lower-right allows the cloning of a list from one group to another (and its modification).

Merlin X Reporting

The reporting tool is easily accessible within the Admin UI. It allows for the editing of existing report templates along with the creation of new reports.

Link to the reporting [user guide](#).

Link to the reporting [training video](#).

Reports (Legacy)

This report area allows an admin user or a user with the specific group entitlement. Default reports include:

Active Users by	Logins
Downloads Active Users	Metadat
by Uploads Applog Entries	a Orders
Assets Viewed	Output History
Average Number of	Popular
Searches Deletions	Downloads
Distinct Values	Published
Downloads	Published
Edits	Metadata Search
Empty Fields	Summary Server
Expiring content	Outputs Uploads
Group entitlements	User Data
Inputs Summary	Users or Groups
Login Summary	Versioned
	Video Edits

Run Reports to generate a variety of on demand reports.

Each report allows for different parameters to be selected; for example user name, image ID or the date range. In some cases, some fields are mandatory. In all cases the report is generated as a CSV file that may be opened in an application that supports spreadsheets.

Administration

Select report from list, fill in values and click "Get Report" to submit the request. The report will be delivered as a .csv file.

Select report from list: Downloads

Downloads (Downloads in specified time period)

*Start Date

End Date

UserName

Source

Credit

FEED

Mandatory fields marked with *.

Get Report

The “Download” report is shown as an example. This report includes a mandatory start date field as well as the optional fields End Date, User Name, Source, Credit, and Feed. Select “Get Report” to generate the report after providing the mandatory start date.

Report Descriptions

ReportName	What it does
Active Users by Downloads	List of users with number of downloads in specified time period
Active Users by Uploads	List of users with number of uploads in specified time period
Applog Entries	Applog Entries for this server (for admin purposes)
Assets viewed	Assets viewed. Note, reports all assets with metadata fetched for given search, user may or may not have actually viewed any specific asset
Average Number of Search Hits	Average number of search results returned over specified period
Comments	A list of items or collections that have comments including when the comment was made and who made the comment
Deleted Collections and Searches	All Collections, Saved Searches and folders marked as deleted but not yet purged from the database
Deletions	If no filters provided, most recent 100 results will be reported.
Distinct Values	All distinct values for specified field. Note, report may be slow to generate if there is a large number of values or if database is large.
Downloads	Downloads in specified time period
Edits	If no filters provided, most recent 100 results will be reported.
Empty Fields	Displays records from selected items within results set with empty fields for the selected field.
Expiry	Objects with expiry dates includes all matching records, not filtered by any AutoPurge rules. Report may be slow to generate if many records have expiry dates.
Group Entitlements	Provides a list of all groups and their associated entitlements.
Inputs Summary	Summary of inputs by data type in specified time period
Login Summary	Number of logins by username in specified time period
Logins	Logins by username in specified time period
Metadata	Specified metadata for selected objects max 500 reported. Note, the more objects and fields included in the report, the longer it will take to generate.
Output History	Displays the output history information for selected records.

ReportName	What it does
Orders	A maximum of 200 orders will be returned, in descending alpha-numeric order by collection name. To filter on order collection name, enter name substring eg date in yyyyymmdd format or email address in Order Collection Name field. Note that the collection name may be truncated so the full email address may not be included.
Popular Downloads	List of assets with download count
Published	Items published in specified time period
Published Metadata	All publication info for selected items max ids allowed, 100
Search Summary	Summary of searches performed over specified period
Server Outputs	Outputs to Server Folders
Uploads	Uploads Uploads by username in specified time period
User Data	List of users, their group membership and email addresses. Leave UserName box blank for list of all users or fill in for info for one user.
Users or Groups	List of all users or all usergroups. Type 'Users' or 'Groups' depending which list is required.
Versioned	Displays items that have been versioned from the selected records.
Video Edits	Video Edits

Sort Order

Add additional options to the MerlinX sort orders.



Default Merlin Sort Orders include sorting by dates, newest to oldest, or oldest to newest, by relevance, or alphabetically by specific fields. NEW in 5.6, sort by comments.

Select the order and display order of content will be refreshed.

Use the Sort Order Admin area to either add to the existing list Simple Options or reconfigure the display and replace default options Advanced Options

TIP: The sort order in effect when a search is saved to the "Saved Search" area is the order that is used whenever the search is run regardless of the previous order set.

Simple Options

Select usergroup to update settings:

☒ Simple options (add to default options) ☐ Advanced options (replace default options)

Simple options: these will be added to the default options

Field	Label	Asc?	
<input type="text" value="Creator (Byline)"/>	<input type="text" value="Creator (Byline) ascending"/>	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending	⬅ ➡ ⬆ ⬇
<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending	

Add a field from the Picklist, add the label to be used and set the ascending/descending order. Use the options on the right to reorder the list or to remove the item from the list.

Advanced Options

Select usergroup to update settings:

☐ Simple options (add to default options) ☒ Advanced options (replace default options)

Advanced options: these will replace the default options

Field	Label	Asc?	
<input type="text" value="Date Input"/>	<input type="text" value="Input Newest First"/>	<input type="radio"/> Ascending <input checked="" type="radio"/> Descending	⬅ ➡ ⬆ ⬇
<input type="text" value="Date Input"/>	<input type="text" value="Input Oldest First"/>	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending	⬅ ➡ ⬆ ⬇
<input type="text" value="Date Created"/>	<input type="text" value="Created Newest First"/>	<input type="radio"/> Ascending <input checked="" type="radio"/> Descending	⬅ ➡ ⬆ ⬇

Use the Advanced Options to recreate the default list.

Thesaurus

Create a thesaurus that is useful to your users. Thesaurus entries are useful to manage commonly used acronyms or abbreviations such as NYC for New York City. Merlin now supports multi-word parents and is bidirectional (search for parents or children).

<p>Word relationships for the Search Thesaurus.</p> <p>TIP: The Thesaurus is turned on by default in version 6.1 of MX and above.</p> <ul style="list-style-type: none">ACCIDENT<ul style="list-style-type: none">CRASHWRECKAMAANIMALAUTOMOBILEBASEBALLCARCBOCOLHETTADETRASEUROPEGOVERNMENTANDPOLITICSHARVESTERSHORSEINSTALLJCAHOJENNIFER COXJETMALNUTRITIONMARLINSREPLACESTONY <p>Add new thesaurus entry:</p> <p>Parent word: <input type="text"/></p> <p>Child word: <input type="text"/></p> <p><input type="button" value="Save"/></p>	<p>Create a new entry by adding a "parent word" and a "child word" in the lower section of the panel. A child word MUST be added at this time otherwise the parent word will not be created.</p> <p>Once a Thesaurus entry has been created, add to the parent word by repeating the process below.</p> <p>If you already have a list of Thesaurus terms, you may provide them to MerlinOne Customer Service, who will import your list all at once.</p>
--	---

Remove child words or parent entries by using the "minus" button to the right of the entry.

Upload

Control the behavior of the Web Upload form with these settings. Control the settings for all uses (Default) or individual groups by selecting the user group.

Select usergroup to update settings: Default

Configuration	Min	Max	Current Value	Set Value
Enable image dimension check: ⓘ				Enable: <input checked="" type="checkbox"/>
Maximum Batch Size: (max files in a single upload batch)	0	25	0	<input type="text" value="0"/>
Minimum Image Dimension:			500	<input type="text" value="500"/>
Maximum Image Dimension:			2000	<input type="text" value="2000"/>
Add to Collection, hide:			Show	<input type="checkbox"/> Hide
Add to Collection, label:				<input type="text"/>
Add to Collection, mandatory:			False	<input type="checkbox"/> Mandatory
Link Records, hide:			Show	<input type="checkbox"/> Hide
Link Records, label:				<input type="text"/>

Save Settings

Merlin can now control the minimum and maximum file size (in pixels) for web uploads. To take advantage of this feature, “Enable” the feature and then enter in the maximum number of files allowed per upload (25 is the maximum that may be configured). Enter in the Minimum and Maximum pixel dimensions desired.

Other Upload features allow for the Upload form to show/hide the options to add content to a collection or to link content (and change these labels). Note that it is possible to force users to add content to a collection during the upload process.

Users and User Groups

The users and user groups section of the admin panel has three easy to navigate sections located on the top left-hand side of the screen.

- Add Users
- Manage Users
- User Groups

Users and User Groups

Add User

Manage Users

User Groups

Add New User

Clear

Save User

Full Name

Group Membership *

User Name *

hostedadmin

Download Filter

N/A

Password *

.....

Edit Filter

N/A

Search Filter

N/A

Direct Login URL

N/A

Password must have at least 8 characters and no more than 16 characters

Password Confirm *

Force Password Reset

☐

Expiry Date

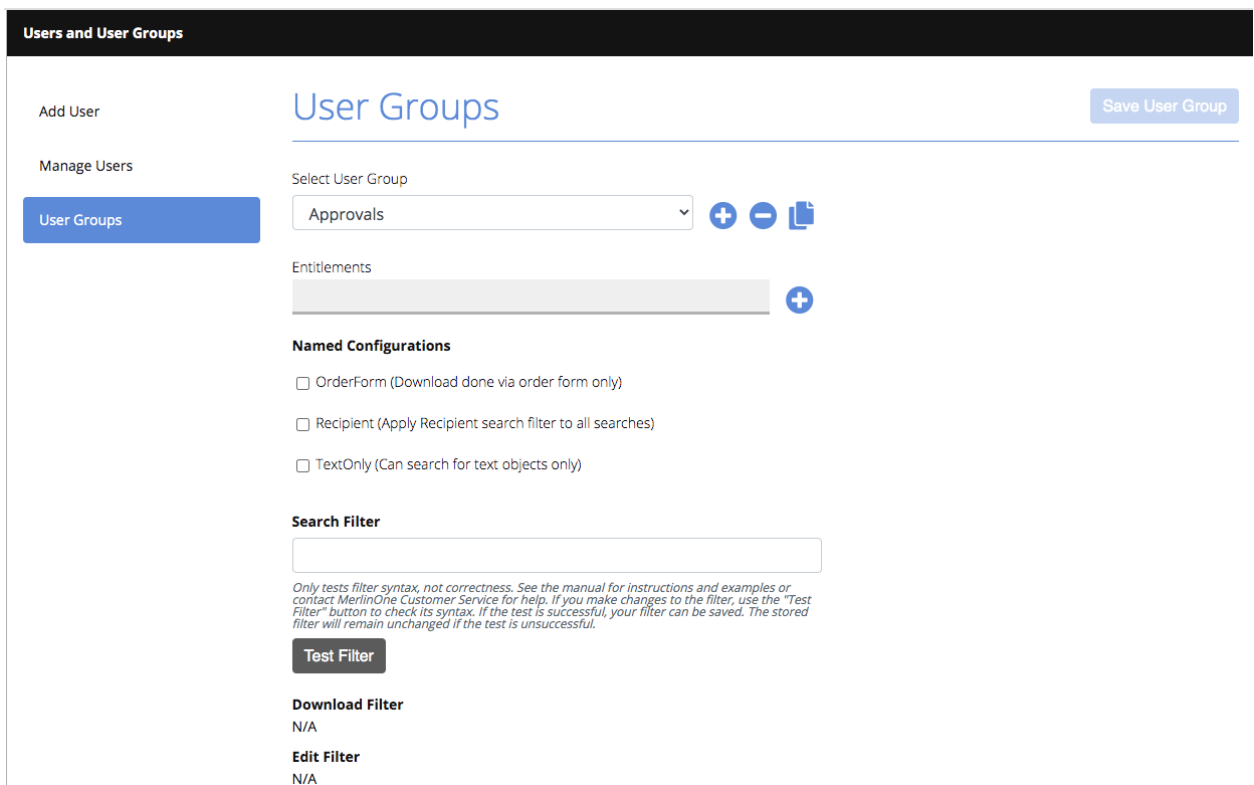
Click to add date

Email Addresses

User Groups

This tool allows an admin to either create new or modify existing Merlin User Groups.

To create a new user-group select the + next to the user group section. Name the user group. Group names should be a single word, that is no spaces. Underscores may be used to replace spaces. Then select the + next to the entitlements section to choose the associated entitlements. Make sure to click save user group to confirm your changes.



The screenshot shows the 'User Groups' configuration page. On the left is a sidebar with 'Add User', 'Manage Users', and 'User Groups' (highlighted). The main area has a 'User Groups' header with a 'Save User Group' button. Below the header is a 'Select User Group' dropdown menu with 'Approvals' selected, and icons for adding, removing, and cloning groups. Under 'Entitlements', there is a list box with a '+' icon to add new entitlements. The 'Named Configurations' section includes three checkboxes: 'OrderForm (Download done via order form only)', 'Recipient (Apply Recipient search filter to all searches)', and 'TextOnly (Can search for text objects only)'. The 'Search Filter' section contains a text input field, a 'Test Filter' button, and a note about testing filter syntax. The 'Download Filter' and 'Edit Filter' sections both show 'N/A'.

Users and User Groups

Add User

Manage Users

User Groups

User Groups

Save User Group

Select User Group

Approvals

Entitlements

Named Configurations

- ☐ OrderForm (Download done via order form only)
- ☐ Recipient (Apply Recipient search filter to all searches)
- ☐ TextOnly (Can search for text objects only)

Search Filter

Only tests filter syntax, not correctness. See the manual for instructions and examples or contact MerlinOne Customer Service for help. If you make changes to the filter, use the "Test Filter" button to check its syntax. If the test is successful, your filter can be saved. The stored filter will remain unchanged if the test is unsuccessful.

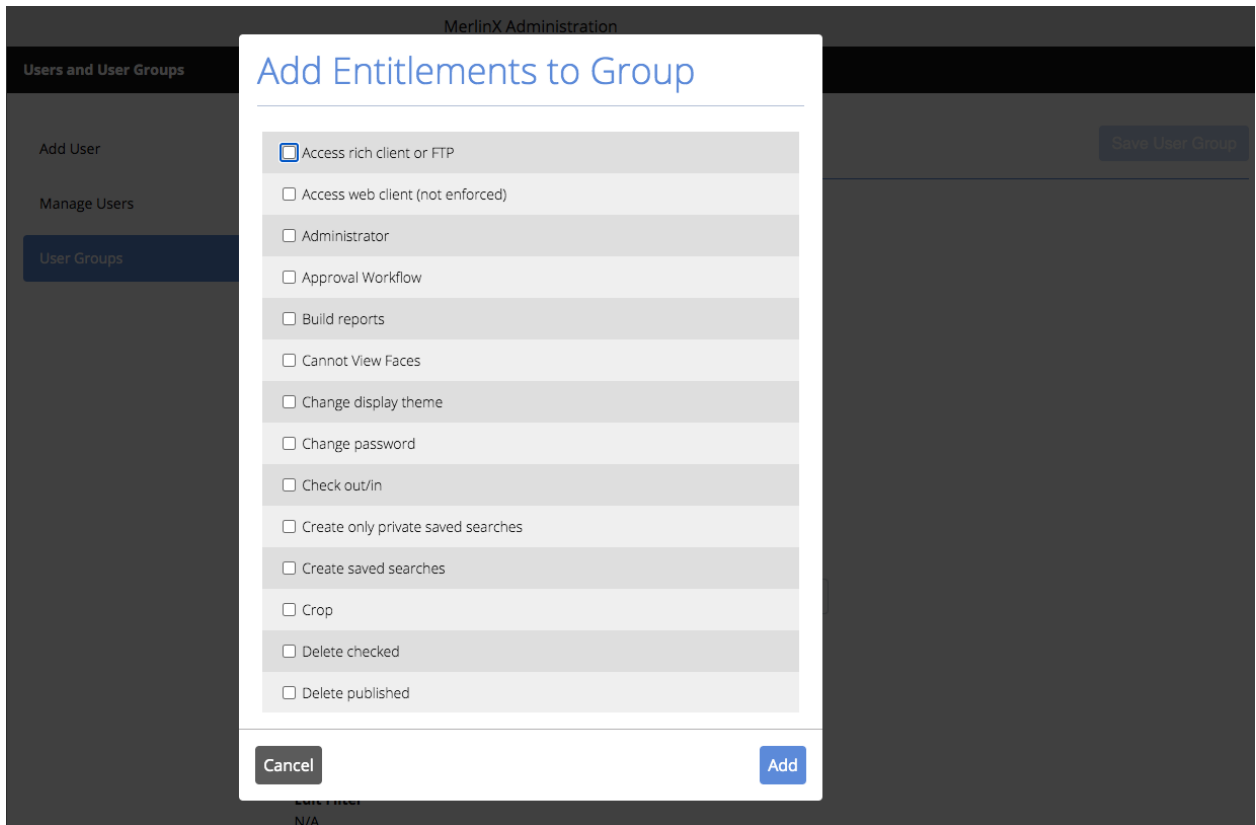
Test Filter

Download Filter
N/A

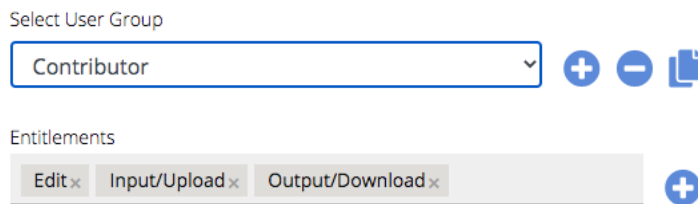
Edit Filter
N/A

To add an entitlement to an existing group, select the user group from the drop

down then select the "+" next to Entitlements select from the list of options and select Add.



To remove any entitlements, select the X next to the associated entitlement.



All users must belong to one or more groups to access Merlin. For sites that use Active Directory, these groups must also be configured in Active Directory. For SAML (Single Sign-On sites, contact MerlinOne customer service for assistance).

MerlinOne recommends that groups are created to manage what people may see and separate groups to manage what they may do. So, most users would belong to at least two groups.

Download and Edit Filters created in the Filter admin area are displayed here. Search filters may now be created here.

Search Filter

(UPPER(CSERVICE13)= ' ')

Only tests filter syntax, not correctness. See the manual for instructions and examples or contact MerlinOne Customer Service for help. If you make changes to the filter, use the "Test Filter" button to check its syntax. If the test is successful, your filter can be saved. The stored filter will remain unchanged if the test is unsuccessful.

Test Filter

Download Filter

N/A

Edit Filter

N/A

It is important to note that Search filters use a different syntax than the SQL filters used for Download and Edit filters.

This filter must be in Merlin DOX format, not SQL. Contact MerlinOne Customer Service for help.

If the group has an existing filter, it may be deleted using the "Delete Filter" button. If the filter is new or edited, use the "Test Filter" to check the syntax. If that test is successful, then the "Save Filter" button will be enabled. Note, the test only checks syntax, it does not check that the logic is correct.

Entitlements

Entitlement	Privilege
Access Rich Client or FTP	Allows a user to access Merlin using the Rich Client (M5) or to use FTP (or Lightroom/PhotoMechanic) software to send content to Merlin using Merlin credentials.
Access Web client not currently enforced	
Administrator	allows access to admin functions
Approval Workflow	allows access to complex approval workflow
Change display theme	change the background colors/theme
Change Password	change your password does not apply to active directory sites
Check out/in	check out or check in content revisions
Create ONLY Private Saved Searches	User is restricted to creating Private searches
Create saved searches	create saved searches for reuse, public and private.
Crop	allows access to cropping tool
Delete checked	delete records that have been marked as approved or protected
Delete published	delete records that have a publication history
Delete records	delete records that have not been marked as approved, published or protected
Delete shared collections	delete shared collections that are owned by others
Delete versioned	allows deletion of older versions of an item
Edit	gives permission to edit metadata
Edit History	permits the editing of an item's history download, published
Edit shared collections	add or remove items from shared collections owned by others
Edit special instructions	edit the special instructions field independent of "Edit"

Entitlement	Privilege
Edit text objects	edit text objects independent of “Edit”
Input/upload	upload button appears, allows a user to upload content
Link/unlink records	link/unlink records manually, currently M5 rich client only
Maintain keyword list	manage the keyword list, currently M5 rich client only
Move shared collections	move relocate shared collections to other collection folders
Output/download	download button appears, allows downloads
Protect records	access to check the “Protect” checkbox, makes it harder to delete
Rename fields	access to renaming fields in M5 client
Run reports	access to reports without being an admin user
Share links	not currently used
Simple Approval	User may access Approved Librarian Checked checkbox
Unprotect records	permission to uncheck “protected”
View all versions	allows user to see other versions of items where they exist
View workflows	For workflow enabled sites. There is an entire list of entitlements related specifically to the optional Merlin Workflow Engine.

Note that “Workflow” permissions are not part of this manual, but part of the Merlin Automation Platform documentation.

Special Group Entitlements

Named Configurations

- ☒ OrderForm (Download done via order form only)
- ☐ Recipient (Apply Recipient search filter to all searches)
- ☐ TextOnly (Can search for text objects only)

Each group may have special privileges associated with them. This includes OrderForm, Recipient and TextOnly. These options override any other configurations.

OrderForm presents the user who are members of a group with OrderForm checked with the Order Form Request, superseding any other download options.

Recipient is a filter on search results for members of this group. The username and the value in the Recipient field must match for users that belong to groups marked as “Recipient.”

TextOnly is for users whose view is restricted to Text objects.

[Add User](#)

New Merlin users may be created using a variety of methods. For sites that use Active Directory Authentication or SAML for Merlin access, contact your local system administrator to add users. Active Directory and SAML users **MUST** belong to Merlin groups, so it will be necessary to add the Merlin groups to the AD or SAML environment.

For sites that use local authentication or a combination of AD and Local Authentication, users may be created by using the Users and Groups section in the Admin Panel then selecting Add User. Complete all the required fields displayed with an * Asterix and any other fields that are relevant. At least one user group must be selected for the user to access the system. Make sure to Save the user once you are done completing the form.

Users and User Groups

Add User

Manage Users



User Groups

Add New User

Full Name

User Name *

Password *



Password must have at least 8 characters and no more than 16 characters

Password Confirm *

☐ Force Password Reset

Expiry Date

Click to add date

Email Addresses

Group Membership *

Download Filter

N/A

Edit Filter

N/A

Search Filter

N/A

Direct Login URL

N/A

Clear

Save User

See the [appendix](#) for an example of Merlin groups and their privileges.

Manage Users

To manage existing users, select the Users and User Groups Section of the Admin Panel and select Manage Users.

Local users, and in some cases, SAML users all appear in a list.

The list order can be filtered by Users, Group and email. Make your filter selection and type in the associated information to find the user or users of interest. The list can be sorted or downloaded.

Users and User Groups

Add User

Manage Users

User Groups

Manage Users

Filter and Sort User List

Filter BySort By

Sort A-Z

Download List

	User	Full Name	Groups	Emails	Actions
<input type="checkbox"/>	adminxpress		MerlinXpressAdmin		Edit Delete
<input type="checkbox"/>	BenN	Ben Nowoselsky	MERLINLIB, MERLINPHOTO, MERLINUSERS		Edit Delete
<input type="checkbox"/>	cbs		MERLINPHOTO		Edit Delete
<input type="checkbox"/>	cforber		MERLINADMIN, SUPERADMIN		Edit Delete
<input type="checkbox"/>	clfUser		MERLINLIB		Edit Delete
<input type="checkbox"/>	ContentHub_Guest	Content Hub Guest Account	Guest_ContentHub		Edit Delete
<input type="checkbox"/>	Demo_dept1user	Dept 1 user	Filter_Dept1		Edit Delete
<input type="checkbox"/>	Demo_dept2user	Dept 2 user	Filter_Dept2		Edit Delete
<input type="checkbox"/>	Demo_dept3user	Dept 3 user	Filter_Dept3		Edit Delete
<input type="checkbox"/>	hhimes	hhimes	MERLINADMIN	hhimes@merlinone.com	Edit Delete

To delete a single-user select the Delete Action next to the user in the list.

To edit a single user select the Edit Action next to the specific user in the list. The Administrator is then presented with a dialog that will allow the following edits and options:

Edit User

Full Name

User Name *

Password *

👁
🔑

Password must have at least 8 characters and no more than 16 characters

Password Confirm *

☐ Force Password Reset

Expiry Date

Group Membership * ⓘ

Download Filter
Edit Filter
Search Filter
(LIBRARIAN=.T.)
Direct Login URL
<https://mdemo34.merlinone.com/MX?all=XXA31CCC7F5B42527E7AFD8A2D00F2FBCBD4F8>

Cancel

Save

- Full name
- Password



The “eyeball” icon will cause the typed password to reveal itself. The key icon will generate a unique password that meets the password requirements set up by the admin user.

- Force Password Reset - It is also possible to force a user to reset their password the next time they log in. Check the box and the user will be forced to reset their password the next time they login. Remember this applies only to users managed only in the password table. For AD or SAML users, this function does not apply.
- Expiration date for the account- Accounts are not deleted or modified in this case. They are prevented from logging in and will receive a message that their account has expired.
- Email address
- Notes
- Group Memberships
- View any filters – Download, edit and search filters associated with the account will display here.
- Direct log in link is only available for non-admin local users. This may be useful for testing, creating guest access or for containing a guest login on another web page. Users are still logging in (when they click the link), but their credentials are contained within the URL.

Batch Actions

Select all or some of the users in the list by using the radio buttons to the left of the user.

- The Administrator is then presented with batch editing options to allow for assigning and revoking user groups.
- An expiration date can be added to users to expire their accounts.
- Additional user actions are available to delete selected users or force a password reset.

Users and User Groups

Add User

Manage Users

User Groups

Manage Users

Filter and Sort User List

Filter By

User

Sort By

Sort A-Z

Download List

Apply to Selected Users

Select Group(s)

Approvals
ApprovedLogosOnly
Contributor

Group Action

Apply

Expiry Date

Enter date

Apply

User Actions

Delete Selected Users

Force Password Reset

	User	Full Name	Groups	Emails	Actions
<input checked="" type="checkbox"/>	adminxpress		MerlinXpressAdmin		Edit Delete

Other User Options



These user options MAY appear in the Options area, found upper left in the User Interface.

Administration

Reserved for admin users.

Change Password

If a user has “Change Password” as part of their privilege, they will be able to manage their own password. This only applies to sites using local authentication; for Active Directory AD sites or SAML sites, passwords are managed elsewhere.

Edit Profile

Allows a user to pick a user friendly name and add a photo to be used in commenting. [Click here for more information about commenting.](#)

Set Personal Login View

Some users may override the default view set by the Admin user.

Choices

include:

- ☐ A blank page
- ☐ Featured Content
- ☐ A Saved Search
- ☐ Upload form

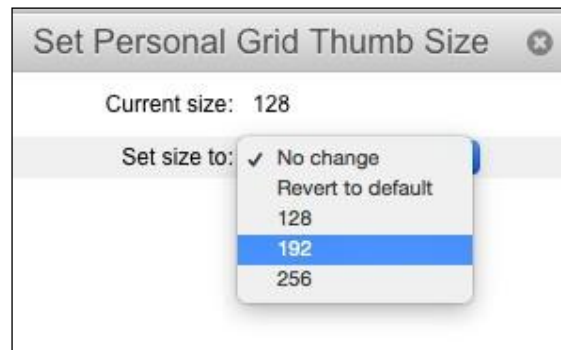
Set Theme

A number of themes or “skins” are included with MerlinX. A user may select the theme most pleasing, and may change it at any time. “Green-High- Contrast” theme has been designed with accessibility in mind.

Set Theme
dark
green-high-contrast
✓ light

Set Personal Thumb Size

A user may override the default thumb size, and set their own preference. Choices include 128 pixels, 192 pixels or 256 pixels.



See Notifications

Allows a user to review "growls" or on screen messages that have occurred during the session.

Notifications for this login session (most recent 100)			
Type	Title	Message	Time
	Save Template	No values found. Template not saved.	5/13/2016 12:17 PM

Download Manual

Provides a directly link to a PDF version of the manual for the Merlin Version running 5.4 users will receive a 5.4 manual, 5.5 users a 5.5 manual and so on.

Other Admin Configurations

Please contact Merlin Customer Support for information regarding server-side configurations.

Appendix A

Merlin Search Tips

Merlin allows for powerful full-text searching using a number of Boolean operators. Powerful Searches may be built by combining search statements.

To use an operator, simply add it to the search.

To include the operator as a search term, put the term in quotes. To search for exact strings, put the search terms in quotes.

Merlin's Boolean operators include: and, or, not, near, within, like, at least and on systems where it has been configured, case for case sensitivity.

See the Search Tips on the next page for additional searching information.

Search Term Tips

AND (Combination operator)

AND is the presumed operator. It combines search criteria to narrow down TERM1 AND TERM2 a search.

TERM1 TERM2
George Bush
Bush George

Results include Jay *George* watering a *Bush*.

OR (Broaden operator)

OR broadens the search. Merlin evaluates the OR clause first, regardless of TERM1 OR TERM2 its placement in the string, unless parentheses are used. Or may be used in both Full text and field specific for advanced searches.

Bush OR Kerry
Kerry OR Bush

(Example: Byline is Smith or Jones)

Results include President *Bush* applauded John *Kerry* while...

NOT (Exclusive operator)

NOT excludes records with the specified criteria and may be used in both Full Text or IPTC fields for advanced searches.

TERM1 NOT TERM2
BUSH NOT George

Results include President *Bush*...but not President George Bush...

(Example: Byline is Smith not David)

LIKE (Phonetic operator)

LIKE is the fuzzy or "sounds like" operator.

LIKE TERM1
LIKE cofi
Like(Smith or Smyth)

Results include *Kofi* Annan spoke at the...and *coffee* growers...

(Try This: Like Cofi not coffee)

NEAR (Proximity operator)

NEAR is used to search for words that appear within a given proximity. The default threshold is eight words, however a numeric operator may be applied to narrow or broaden the proximity.

TERM1 NEAR TERM2
TERM1 NEAR 4 TERM2
Bush NEAR Cheney
Bush NEAR 4 Cheney

Results include Dick Cheney travelled with President Bush

THEN (Ordered operator)

THEN is the ordered search operator. Words appear in a particular order.

TERM1 THEN TERM2
TERM1 THEN TERM2
Bush THEN chad

Results include President *Bush* discused election *chad*...

ATLEAST (relavance operator)

ATLEAST is used to only show objects where the search term appears at least a specified number of times

ATLEAST 3 TERM1
ATLEAST 3 BUSH

Results include *BUSH* mentioned a minimum of three times in the indexed text fields.

? (single character wildcard)(Full Text Search Only)

The question mark (?) is the single character wildcard.

term?
t?rml

Results include *Runs* but not running in the first instance, *run*, *ran* but not run? roan in the second example

r?n

* (multiple wildcard character-including leading character searches) (Full Text Search Only)

The asterisk (*) is a multiple-character wildcard. Search criteria must have at least three letters.

term*
T*I
*term
inter*

Results include *interesting*, *Interpol*, *interpreter*, *international*

"" (Exact phrase searching) (Full Text Search Only)

Using quote marks (") to contain a search string forces an exact match search on those terms.

"TERM1 TERM2"
"President Bush"

Results include *President Bush*, but not President George Bush

Appendix B

Default Merlin Groups and Permissions

Each Merlin site starts with a set of basic Merlin Groups. Group membership by users determines what privileges a user may access. Membership in multiple groups combines privileges.

Privileges may have been reset and some sites may have many more user groups. Refer to the Group Settings page in the Admin area to determine specific privileges associated with individual groups. Use this as a worksheet to manage your permissions.

This is an example ONLY. Check your settings to confirm group privileges.

	MerlinAdmin	MerlinLib	MerlinPhoto	MerlinProdn	MerlinUsers
Administrator	✓				
Approval	✓	✓			
Change Display Theme	✓	✓			
Change Password	✓	✓			
Check out/in					
Create Saved Searches	✓	✓			
Crop	✓	✓			
Delete Checked	✓	✓			
Delete Published	✓	✓			
Delete	✓				
Delete Shared Projects	✓	✓			
Delete Versioned					
Edit	✓	✓			
Edit History	✓	✓			

Edit Shared Projects	✓	✓			
Edit Special Instructions	✓	✓			
Edit Text Objects	✓	✓			
Input/Upload	✓	✓	✓		
Link/Unlink Records	✓	✓			
Maintain Keyword List	✓	✓			
Move Shared Projects					
Output/download					
Protect Records	✓	✓			
Rename Fields	✓	✓			
Share Links					
Unprotect Records					
View All Versions					

Administrator

Access to Admin Menu

Approval

Set Librarian Checked

CanEditComplexWorkflows

For workflow enabled systems

CanEditDangerousWorkflows

For workflow enabled systems

CanEditSimpleWorkflows

For workflow enabled systems

CanEditSystemWorkflows

For workflow enabled systems

Change Display Theme

Change the skin (look) of MX

Change Password	Allows the user to manage their own password Local authentication only
Check out/in	User may use Version control to check out or check in content.
Create Saved Searches	Allows the user to create saved searches
Crop	Access to Crop tool
Delete Checked	Allows the user to delete records from the database that have been either protected or approved.
Delete Published	Allows the user to also delete records that have been marked as published
Delete Records	Delete records may require other delete privileges specific to the metadata
Delete Shared Collections	This user may delete earlier versions of an item
Delete Versioned	
Edit	May Edit Metadata
Edit Shared Collections	May add to or remove content form shared projects
Edit Special Instructions	Access to edit the Special instructions
Edit usage History	Allows creating and editing of usage History
Edit Text Objects	Required to edit metadata in text objects
Input/Upload	Allows users to upload content using web form or M5 Send to Merlin function
Link/Unlink Records	Allows users to link or unlink records manually
Maintain Keyword List	Allows the user to maintain a managed keyword list
Move Shared Collections	Allows users to move shared collections
Output/Download	User may download or export content
Protect Records	User may mark records as protected
Rename Fields	Allows users access to relabel fields.
Run Reports	Allows non-admin users access to reports
Share Links	Allows user share a collection or search with others
Unprotect Records	User may “unprotect” records
View All Versions	Allows user to view all versions of an object requires that server have versioning enabled

Appendix C

Supported Merlin File Types

MerlinOne uses libraries and SDKs to ensure forward compatibility. Merlin can store any file type. Supported file types include files where Merlin can generate a preview or thumbnail of the file and extract metadata associated with the file.

Supported photo files include: JPG, PSD, CR2, NEF, DNG, BMP, PNG, TIF, PDF, PICT, BMP, & GIF. For file types where supported, all embedded metadata is associated with respective fields in Merlin. For raw camera files, either embedded metadata or XMP sidecars are supported. (Queues for input must be configured for sidecar files.)

Merlin supports PDF, AI, and EPS files. All text layers for these formats are indexed for searching purposes.

Microsoft Office documents are supported. All text in Word documents is indexed for searching purposes, even hidden cells on multiple worksheets of an XLS/XLSX file are indexed.

Common video and audio formats supported: MPEG-1, MPEG-2, DV, Windows Media, Quicktime, AVI, MP4, mov, MXF, m2v, mts, asf, rm, mp3, and wav. Merlin uses FFMPG as a decoder which supports a huge list beyond these and is always adding more. Merlin listens to Audio/Video content and converts the spoken word to searchable text.

Merlin can also import metadata from external sources like spreadsheets, when so configured.

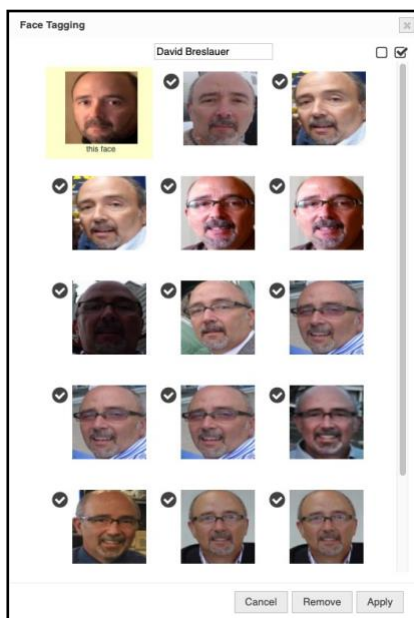
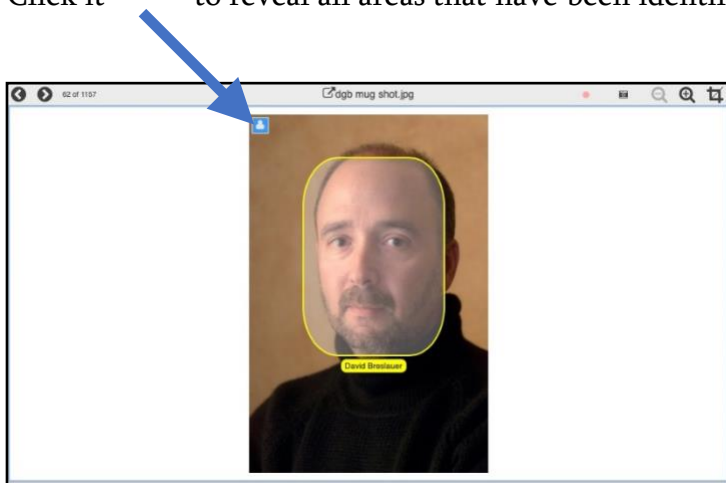
Appendix D

Merlin^{AI} Facial Recognition

Installed as an [Option](#), Merlin has the ability to recognize faces in photos and identify individuals that have previously been tagged. To take advantage of facial recognition, the system must first be trained. Contact your MerlinOne representative if you are interested in having MerlinOne's Facial Recognition installed on your server.

The “Faces” icon in the large thumb denotes that faces have been found. The icon reveals itself on mouse roll-over or by clicking the icon.

Click it to reveal all areas that have been identified as faces.



To train your system, go to Single View. Any faces will be identified by a yellow box if the face tag icon is selected (upper left of thumbnail).

Click on the yellow box(es) for the name tag and a dialog appears.

The top part of the dialog box allows a user to enter in the name of the person shown.

The lower part of the dialog tries to identify similar faces. You can train the system by deselecting faces that do not match.

Click “Save.” You have now trained your system, AND identified the same face in other photos.

This information becomes part of the facial recognition database AND is also entered into the “Persons” field in Merlin for searching.

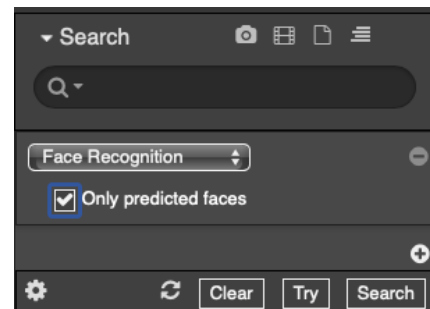
For photos where multiple faces appear, the process is the same. Simply identify everyone with yellow box surrounding them.



Now when new photos are added to your Merlin, Merlin will try to identify any faces it recognizes and will label them as “Predicted Faces” so they may be reviewed and approved.

Simply use the the “Thumb’s Up/Down” option to review the proposed tag.

Merlin makes it easy to find predicted faces. Use the Face Recognition option in the Advance Search options to search for predicted faces. This may, of course, be part of other more complex searches.



Contact your MerlinOne representative to purchase this option.

Merlin^{AI} Visual Similarity

Installed as an [Option](#), Merlin has the ability to find similar content based on pattern matching. From Exact duplicates, to near duplicates to similar items, use the optional feature to solve the “I am looking for more photos that look like this” problem.

This uses the actual pixel values and patterns to determine similarity, and has nothing to do with metadata. Use the “More Like This” tool for that legacy function.

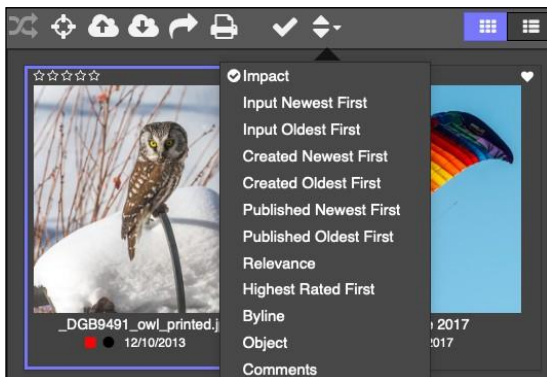


Use Merlin’s Magic Wand tool to find visually similar content with a mouse click. Results are displayed by relevance.

Contact your MerlinOne representative to purchase this option.

Merlin^{AI} Merlin IMPACT

Installed as an [Option](#), Merlin has the ability to sort results, whether from searching or collections, into Good to Bad using the training of expert photo editors. It uses criteria such as composition, exposure and sharpness to determine the relative merits of content



Select IMPACT from Merlin’s Sort Menu to rearrange content from Good to Bad.

Contact your MerlinOne representative to purchase this option.