Sharing Documents

Guides for Merlin Server

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Sharing Documents - as of April 2020

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This quick guide explains how to share documents with Merlin Server.

Merlin Server allows you to share documents created using Merlin Project 4.0 or later. There are two ways to share a project: One by using Merlin Project, another by using Merlin Server's functionality.

Sharing over Merlin Server's application windows

If you have a Merlin Project file that you created using Merlin Project and need to share it, start the 'Sync' service in Merlin Server. Locate the file in the Finder and drag it onto the 'Sync > Documents' window of Merlin Server.

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Services				Q general projec	t m🛛
• 💭 Sync	Documents	Search: This Mac "Desktop"			e 🕂
Documents		Name	^ Size	Kind	Date
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Web	General Project Management Plan				
Server	There are currently no documents on this Merlin Server. To upload documents, drag them into this area.	-			
C Licenses					
Tenants					
	+ - Remote Management Passwo				
Accounts Web Server Certificates Dicenses	There are currently no documents on this Merlin Server. To upload documents, drag them into this area.				

It will be uploaded to Merlin Server, can be subscribed to by any Mac or an iOS device, or viewed in a web browser (if you enable the 'Web' service).

•••	Merlin Server		
Services Sync	Documents		
Documents			
📢 Publishing		Access Size	
(C) Accounts	🐮 General Project Management Plan	2.1 MB	
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The file in the Finder window can be deleted, as Merlin Server doesn't require it anymore.

Sharing over Merlin Project's macOS application

If the admin of Merlin Server wants to allow users of Merlin Project to share projects on Merlin Server, the admin can enter a **Remote Management Password** and forward this information to those users.

To set the **Remote Management Password**, click the relevant button in Merlin Server's 'Document' window.

O O Merlin Server						
Services	With the remo	nge remote management password the remote management password users can publish documents with in Project and Merlin Project Go to this server.				
Docu Publishin C Accou	Pa: Confirm Pa:	ssword: ssword:	•••••	Cancel OK	ze	
Server Certificate Conses Licenses Tenants	95			There are currently no documents on t Server. To upload documents, drag them into thi		
		+ -		Remote Manage	ment Password	

Forward the **Remote Management Password** to the Merlin Project user whom you allow to share files on Merlin Server.

To share a project over the Merlin Project macOS application:

- Start Merlin Project on a mac and open an existing file first.
- Share the project using the option 'Sync > Share Document on Merlin Server',

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0	to	▼ New website		Using iCloud Drive	, Drop	box or <u>Merlin Serve</u> with other user		nare this document	
1	C Z	Project Start	Thanks to our patented MagicSync technology you can synchronize your documents live across all your iOS and macOS devices. On macOS you can also share documents via other cloud services and file servers.						1
2	Ø	Pre-production							
13	0Z	Pre-production finished		also share u	scume		services and	The servers.	
14	Ø	Site Production				N		See	
25	C Z	Production finished				ets.		- Qt	
26	Ø	▼ Post-production	Sh	are document via a		Share document of	nn a	Setup Merlin Server	
27	Ø	Define Maintenance Schedule		cloud service		Merlin Server		account details	
28	C Z	Project Retrospective			>>	End	Unrestrict	ed	\$
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• and select the Merlin Server account.

If the Merlin Server installation isn't located withing the LAN and not automatically discovered by Bonjour, a new Merlin Server account needs to be created first. To do so, go to 'Manage Accounts...'

Share document Please choose a location on a Merlin Se n. Server ✓ No Sync Service Accour Name Manage Accounts	rver at which to share the document "General Project Management Plan" from ts	now .ogir
	There are currently no documents on this Merlin Server.	
+ -	Cancel	hare

and add a Merlin Sync Server.

		Accounts	
		Ē 🎼 🥥	
	General Ten	plates Library Accounts A	ccess to Folders
Accounts		Тур	e: No Selection
		Nam	e:
		Server Addres	s: merlin.example.com
		Pol	rt: optional
		User nam	e: optional
Merlin Server		Management Passwor	d: optional
FTP SMTP WebDAV		Connection statu	s: No Selection
+ -			



Only a Merlin Server with a green connection status allows you to connect to the Merlin Server account.

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lame			▲ Access	Size
• • •		Accounts		
	0 4	= 11 @		
		plates Library Accounts Acces	ss to Folders	
Accounts		Type:	Merlin Server	
0.7		Name:		
Merlin Serv	er			
		Server Address:	mac.local	
		Port:	7190	
		Management Password:	optional	
		Tenant:	optional	
		Connection status:	•	
+ -				

Once a Merlin Server account is selected, click the 'Share' button

erver: M	erlin Server			\$	Login
Name			▲ Access	Size	
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and enter the Remote Management Password to confirm your authorization to share the file on that Merlin Server.

Ð	Enter the document management password.
	Password:
	Remember password in Keychain
	Cancel Share

From now on Merlin Server will list the document for other users to subscribe to. You can keep on working with the file you are currently editing in Merlin Project. It will be shared on the server and published at once from that server. There is no need to re-subscribe from that Mac.

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Server:	Merlin Server					.ogin
Name				Access	Size	O
<u>B</u>	New website				2.2 MB	
+ -					Subs	cribe

Sharing over Merlin Project's iOS app windows

To share a project over your Merlin Project iOS app, you need to know the 'Remote Management Password' of the Merlin Server installation and to enter it in the Merlin Server Account information.

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		Projects	s — Merlin Server	
Merlin Project	Cancel	Account	Save	
Locations				
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On My iPad	Server Address		my-mac.local.	
Projects — Merlin Serve	Port		7190	
Recently Deleted	Connection status		Connected	
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ravountes	Show public documents			
Tags	Show documents for user			
Rot	Manage documents		~	
Orange				
Gelb	MANAGE DOCUMENTS			
Grün	Management Password		•••	
	Enter the document management new documents.	password to list all documen	ts and upload	
Blau	new adcuments.			
Lila				

If the Merlin Server installation isn't located in the LAN and not automatically discovered by Bonjour, a Merlin Server account needs to be added first.

Once a Merlin Server account exists, to share a project over your Merlin Project iOS app use the options the iOS app offers in the locations area.

Locate the file in its current location, tap and keep on pressing until the contextual menu appears, tap on 'Move' and select a Merlin Server location.

	Edit	🕻 On My iPad		Merlin Pr	oject		+	<u></u>	Select
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iCloud Drive									
On My iPad		I		End					
E Projects — Merlin Server		Create Projec		My Project					
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Once a Merlin Server location is selected, you can share the project by tapping the 'Copy' button.

✓ App Store 14:34 Tue 12. Mar		🗢 66 % 🔳
Item will be copied to Projects — Merlin Server.		දිරිදි Select
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