



Publishing

Guides for Merlin Project

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Publishing - as of November 2020

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Note for Merlin Project Express users



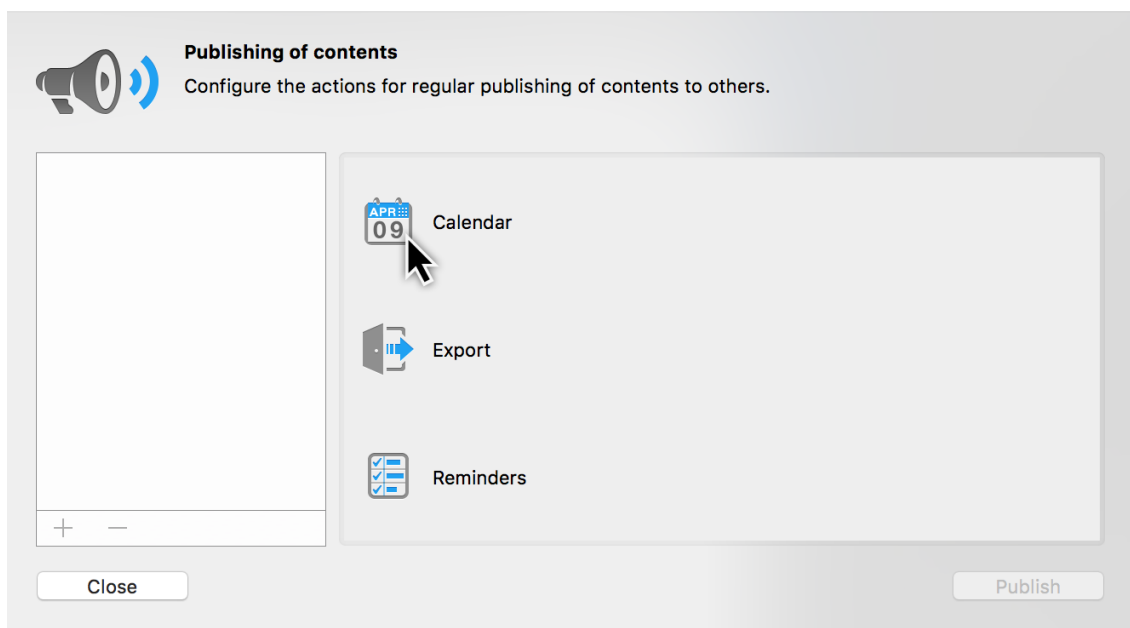
The following functions are only available in [Merlin Project](#).

This short guide describes how to use the »Publish« function in Merlin Project and automate the export of project content.

The »Publish« function lets you configure **Actions**, with which you can provide project content on a regular basis to other users.

To configure your publishing actions:

- Call from the menu **File** → **Publish** → **Settings...**
- Click one of the three available publishing options or click the **+** symbol.

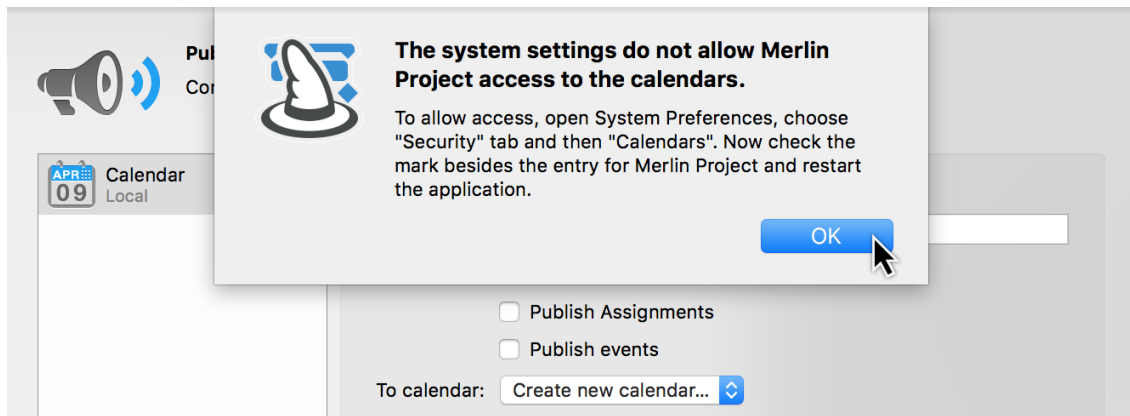


You can choose between three **publishing options**:

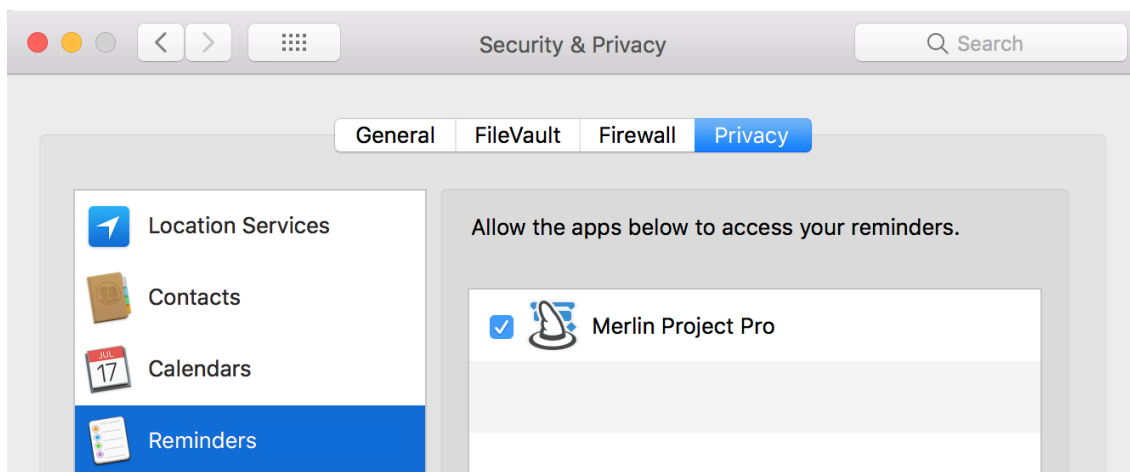
- [Calendar](#)
- [Export](#)
- [Reminders](#)



To be able to publish to **Calendar** and **Reminders**, you will need to allow **access** for Merlin Project to those apps in the **macOS** system preferences.

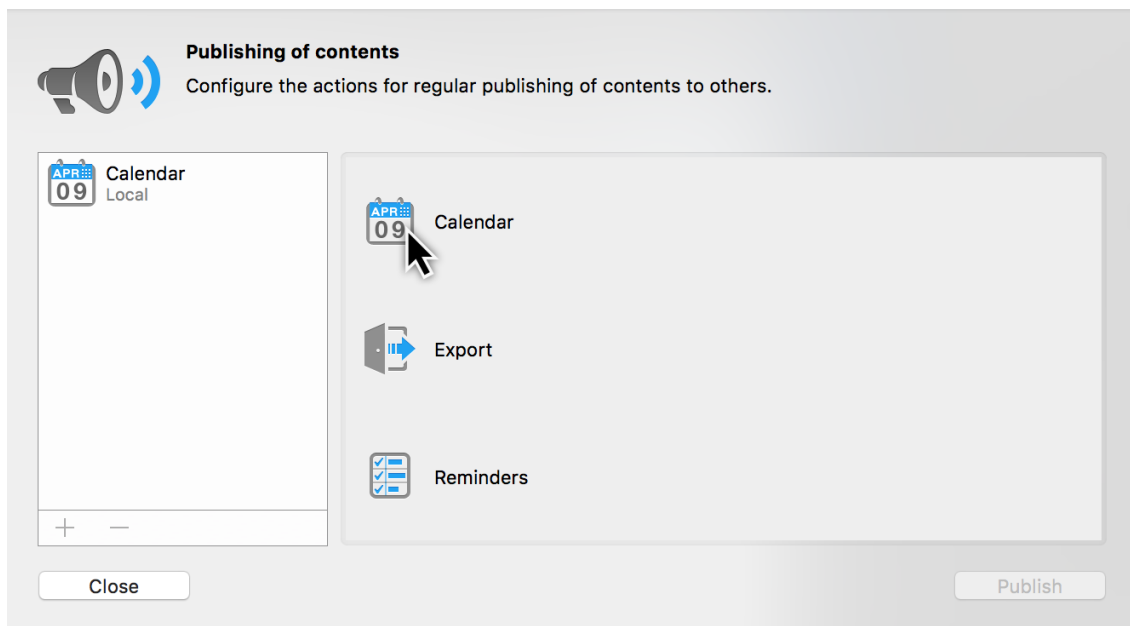


In **macOS** open **System Preferences > Security & Privacy > Privacy**. Select **Calendar** and check the mark besides the entry for **Merlin Project**. Select **Reminders** and check the mark besides the entry for **Merlin Project** as well.

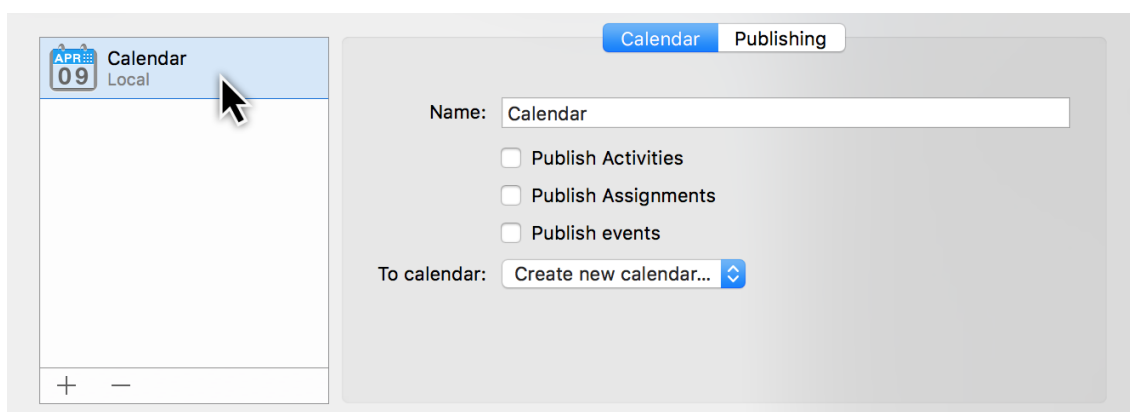


Calendar

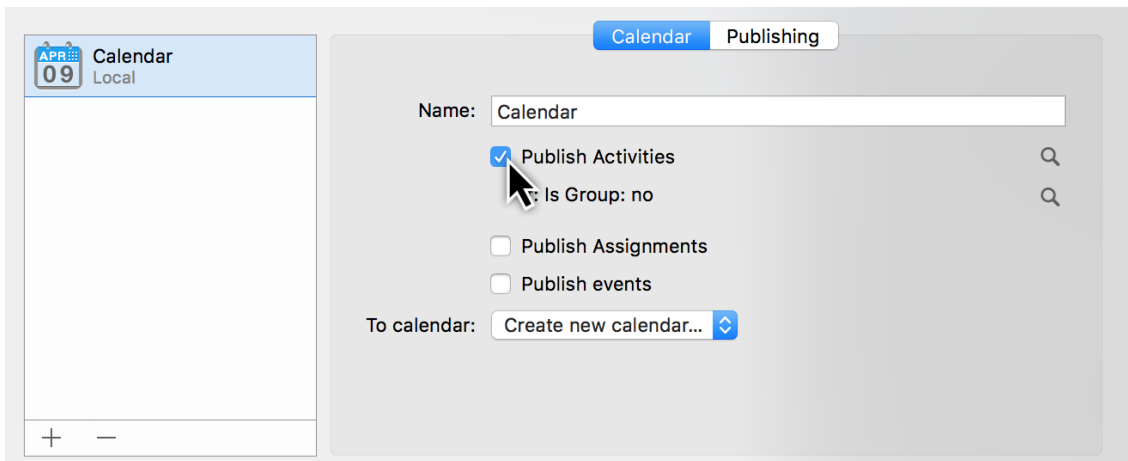
The **Calendar** publish option lets you publish project content locally to the **macOS Calendar app**.



- Click **Calendar** or the **+** symbol to create a new publishing action.



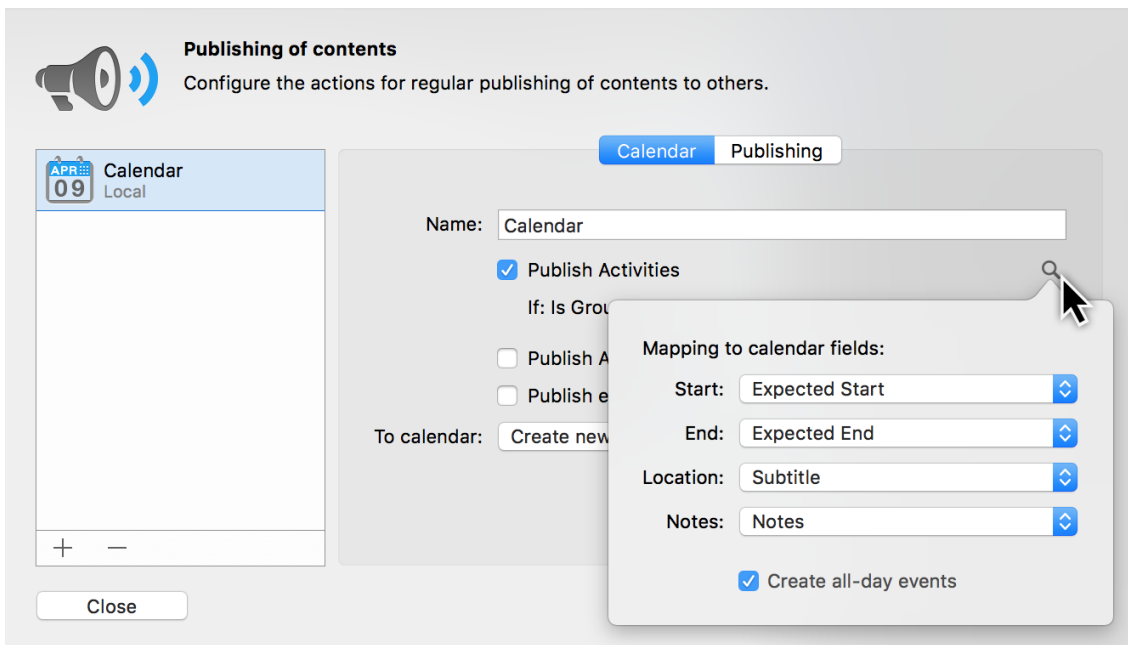
- Enter a **Name** for the calendar publishing action.
- Choose which information should be published and is to appear in the **Calendar*** app.




- Publish Activities
- Publish Assignments
- Publish Events


Check which ever options desired.

Click the **magnifying glasses** to configure the options for publishing **activities**, **assignments**, and **events** to the calendar.



The first **magnifying glass** lets you map the Merlin Project information to the **calendar fields**. The **calendar fields** are set by the **macOS Calendar app** and cannot be changed.


Publishing of contents
 Configure the actions for regular publishing of contents to others.


Calendar
 Local




+

–

Close

Calendar Publishing

Name:

☒ Publish Activities
 If: Is Group: no

All of the following conditions are true:

Activity

Is Group

no

–

To calendar

+

–

Publish


The second **magnifying glass** includes various publishing conditions. This allows you to filter the information you publish in the calendar.


You can also modify the above options for any of your calendar publishing actions at any time.

In the final step, under the **To calendar** option, select a calendar from the **Calendar app** or **Create new calendar**.



This step cannot be undone! If a calendar that already exists in the **Calendar app** is selected, publishing will **delete** the existing calendar entries.


Publishing of contents
 Configure the actions for regular publishing of contents to others.


Calendar
 Local



+

–

Close

Calendar Publishing


Name:

☒ Publish Activities
 If: Is Group: no

☐ Publish Assignments
☐ Publish events

To calendar:



+

–

Publish



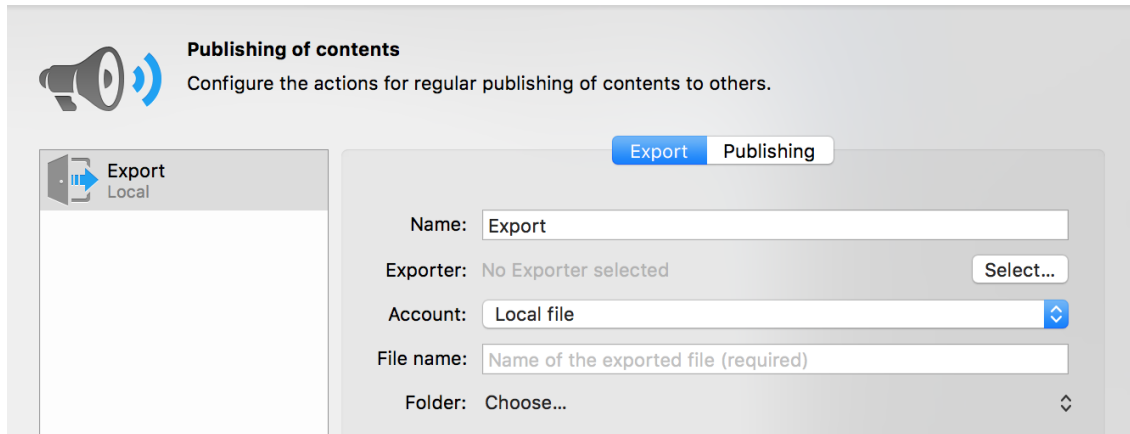
It is best to create a new calendar to publish to. To do so, select the ***Create new calendar...*** option from the drop-down menu.

Export

The **Export** publish option lets you publish project content using the **built-in exporter**.

Click **Export** or the **+** symbol to create a new publishing action.

Configure the **export** publishing action. Following options are available:



Publishing of contents
Configure the actions for regular publishing of contents to others.

Export Publishing

Export Local

Name: Export

Exporter: No Exporter selected **Select...**

Account: Local file

File name: Name of the exported file (required)

Folder: Choose...

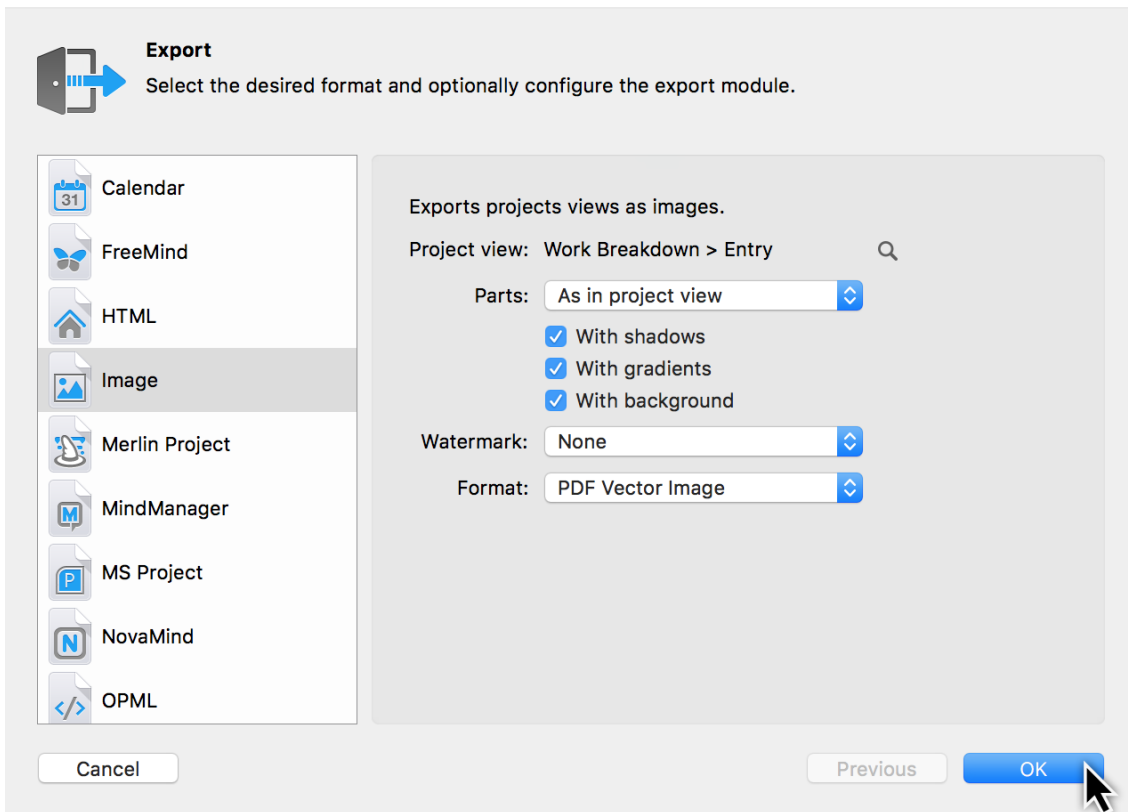
- Name
- Exporter (*must be selected*)
- Account
- File name
- Folder

Name

Enter a **Name** for this publishing action.

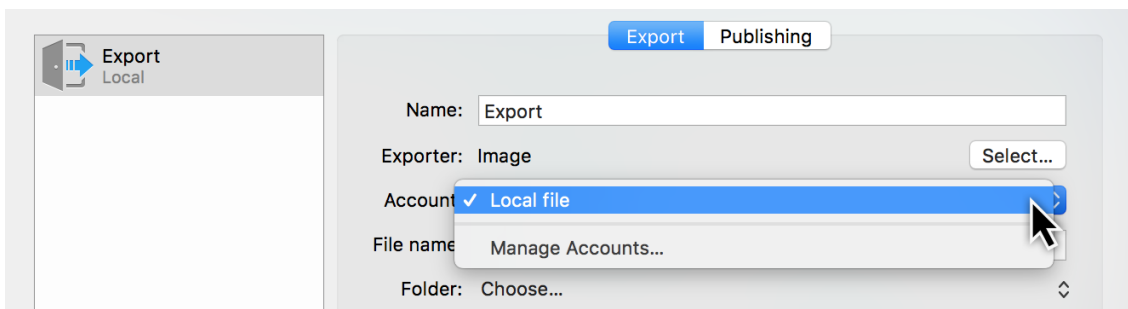
Exporter

Click **Select....** In the **Export** window, select a publishing format and configure it as required.



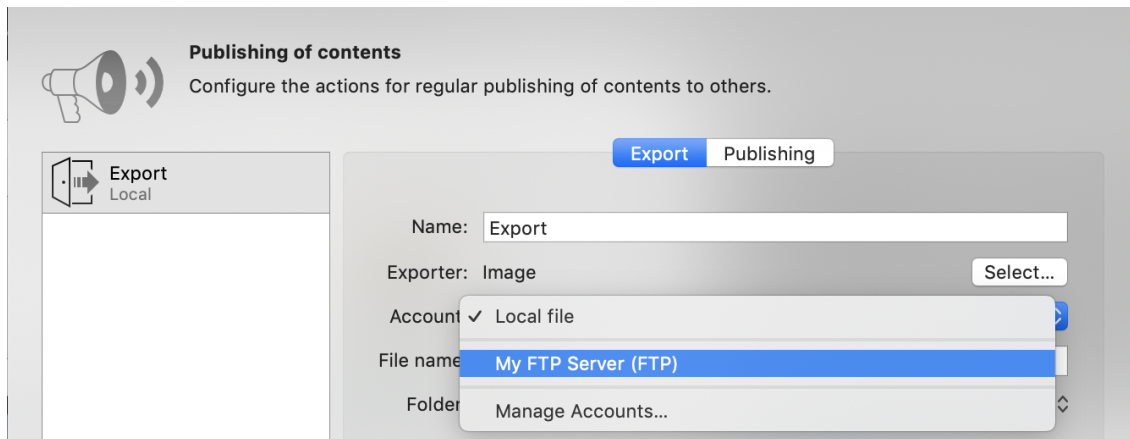
Account

The **Account** option is set to **Local file** by default. This means, the export is published in a **folder** locally to your Mac.



Upload or email published content automatically

If you have defined FTP, WebDAV / SMTP Accounts in [Preferences - Accounts](#), you can select an Account here in case you want to automatically upload the exported content on an FTP or WebDav Server or send it as e-Mail.



Select **Manage Accounts...** to insert new accounts if needed.

File name

Enter the name of the exported file.

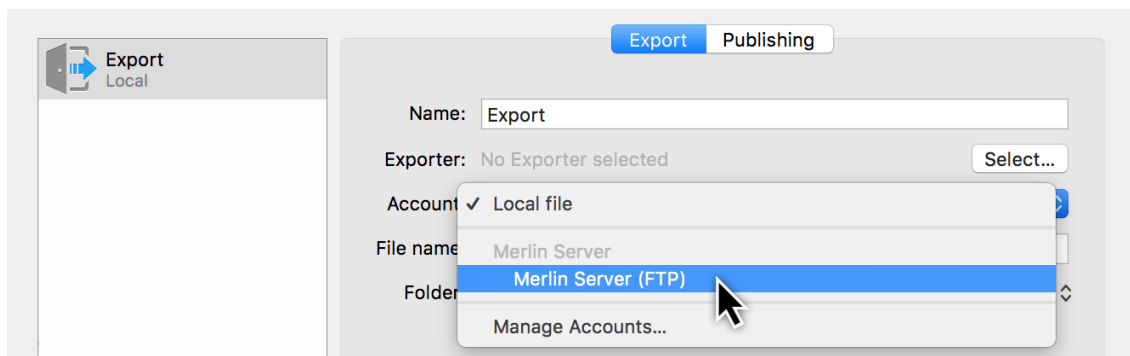
Folder

Define the folder in which you want to save the file to. Click **Choose...** and select a folder on your Mac.

Exporting via Merlin Server publishing accounts

Do you have a Merlin Server installation and edit currently a subscribed project from there?

In this case, you can select an Account from that Merlin Server for your publishing action as well.



Reminders

The **Reminders** publish option lets you publish project content to the **macOS Reminders app**.

Click **Reminders** or the **+** symbol to **create** a new publishing action.

Publishing of contents
Configure the actions for regular publishing of contents to others.

Reminders Publishing

Name: Reminders

☐ Publish Activities

☐ Publish Assignments

To Reminders list: Create new reminders list...

Close Publish

- Enter a **Name** for the Reminders publishing action.
- Choose which information should be published and is to appear in the **Reminders** app.

Publishing of contents
Configure the actions for regular publishing of contents to others.

Reminders Publishing

Name: Reminders

☒ Publish Activities Is Group: no

☐ Publish Assignments

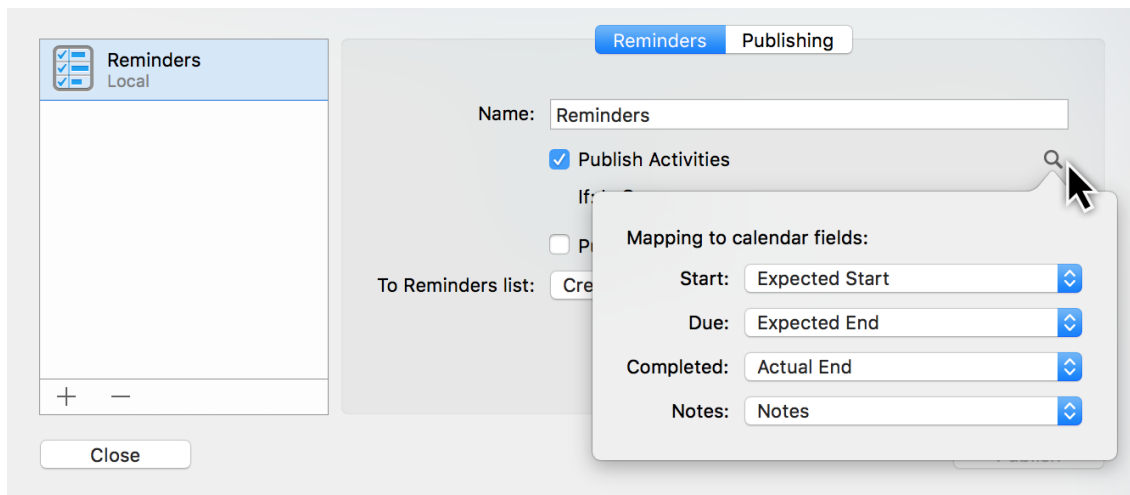
To Reminders list: Create new reminders list...

Close Publish

- **Publish Activities**
- **Publish Assignments**

Check which ever options desired.

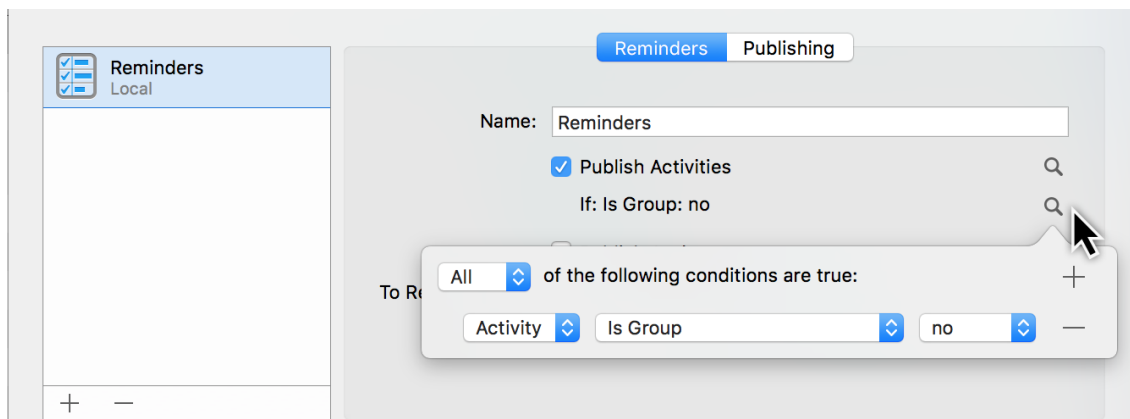
Click the **magnifying glasses** to configure the options for publishing **activities** and **assignments** to **Reminders**.



The first **magnifying glass** lets you map the Merlin Project information for the **calendar fields**.



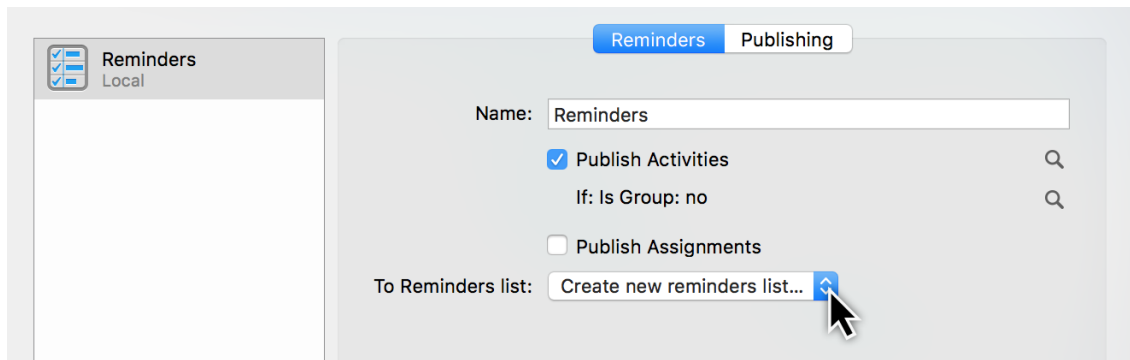
Calendar fields are set by the **macOS Reminders app** and **cannot be changed**.



The second **magnifying glass** includes various **publishing options**. This allows you to filter the information you publish in the **reminders**.

You can also modify the above options for any of your calendar publishing actions at any time.

In the final step, under the **To Reminders list** option select a Reminders list from the **Reminders app** or **create a new Reminders list...**



This step cannot be undone! If a **reminder** that already exists is selected, publishing will **delete** the existing reminders. As such, it's best to create a new reminders list to publish to. To do this, select the option **Create new reminders list...** from the drop-down menu.

Publishing tab

In the *Publishing* tab you can configure your publishing action to:

- **publish when saving**
- publish **regularly on** defined days and time

Just enable the **checkbox** next to **Publish: When saving**. This will update the **published content** automatically each time you **save** your project.

Or you select the days and time your publishing action should automatically get activated on regular basis.

This dialogue will inform you about the last published time points and if an error occurred.



Test Publishing at least once to make sure that your publishing action is set correctly and works as desired.

Publish all

To update content manually, click the **Publish** button or select from the menu **File → Publish → Publish**.



By **File → Publish → Publish** all configured publishing actions are executed.