Sharing Documents

Guides for Merlin Server

© 2020 - ProjectWizards GmbH

Sharing Documents - as of April 2020

Sharing over Merlin Server's application windows	1
Sharing over Merlin Project's macOS application	2
Sharing over Merlin Project's iOS app windows	8

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.

• • •	Merlin Serve	er'		Searching "Des	ktop"			
Services					~ (<u> </u>	\$\$ ~	Q general project	t m🛛
• 🛞 Sync		ents		Search: This Mac "Desktop) "			+
Documents				Name	^	Size	Kind	Date
	Name	Access	Size	General Project Manager	nent Plan	2.1 MB	Merlinument	Toda
(Accounts								
Web	deneral General	Project Management Plan						
Server	There are Server. To upload	currently no documents or documents, drag them into t	n this Merlin this area.					
Dicenses								
Tenants								
	+ -	Remote Mana	gement Password					
Tenants	+ -	Remote Mana	igement Password					

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	Name A	Access Size	
(C) Accounts	Ceneral Project Management Plan	2.1 MB	
🚱 Web			
Server			
Certificates			
C Licenses			
Tenants			
	+ - Rem	note Management Password	I

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.

0 0 0	O Merlin Server					
Services	Change ren With the remo Merlin Project	nge remote management password the remote management password users can publish documents with n Project and Merlin Project Go to this server.				
Docu Publishin C Accou	Pa: Confirm Pas	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 this	his Merlin s area.	
		+ -		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',

••• + • 5=	₹ 8 • \$ 	New website — Ec	lited	
Work Break	kdown > Entry Title ▼ New website	This doo Using iCloud Drive, Dr	cument has not been s opbox or <u>Merlin Server</u> you with other users.	shared yet. can share this document
1 @2 2 2 13 @2	 Project Start Pre-production Pre-production finished 	Thanks to our patento documents live across also share docur	ed MagicSync technology y all your iOS and macOS de nents via other cloud servio	you can synchronize your wices. On macOS you can ces and file servers.
14 🖉 25 ØØ 26 Ø	 Site Production Production finished Post-production 	Share document via a	Share document on a	Setup Merlin Server
27 🗷 28 Ø 🗷	 Define Maintenance Schedule Project Retrospective 	cloud service	Merlin Server	account details
29 🗹 30 🖉 🗷	 Final presentations Post-production finished 	» >>	Alignment AS	AP 😋

• 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...'

Nare document Please choose a location on a Merlin Sen n. Server ✓ No Sync Service Account Manage Accounts	rver at which to share the document	"General Project Management Plan" from now
	There are currently no docum Server.	tents on this Merlin
+ -		Cancel

and add a Merlin Sync Server.

		Accounts	
	0	= 🚺 🥥	
	General Terr	plates Library Accounts Acc	cess to Folders
Accounts		Туре	: No Selection
		Name	:
		Server Address	merlin.example.com
		Port	t: optional
		User name	: optional
Merlin Server		Management Password	l: optional
FTP SMTP WebDAV		Connection status	No Selection
+ -			



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

erver: Merlin Server	•			Cogin
lame			▲ Access	Size
• • •		Accounts		
	0 4	🗧 🚯 🥥 📃		
	General Tem	plates Library Accounts Acces	ss to Folders	
Accounts		Type:	Merlin Server	
Marlin Sarr		Name:	Merlin Server	
S Merlin Serv	er	Occurs Address		
		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	
	!	There are currently no docum Merlin Server.	ents on this		

and enter the Remote Management Password to confirm your authorization to share the file on that Merlin Server.

£	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.

•		Merlin Serve	er — Documer	nts		
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.

14:02 Tue 12. Mar				🗢 69 % 🔳
		Projects	s — Merlin Server	
Merlin Project	Cancel	Account	Save	
Locations				
	Туре		Merlin Server	
iCloud Drive	Name		my-mac	
On My iPad	Server Address		my-mac.local.	
Projects — Merlin Serve	Port		7190	
Recently Deleted	Connection status		Connected	
Favouritos				
ravountes	Show public documents			
Tags	Show documents for user			
Rot	Manage documents		~	
Orange				
Gelb	MANAGE DOCUMENTS			
Grün	Management Password		•••	
	Enter the document management	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		+	රි	Select
Merlin Project		Copy Duplicate	Rename	Move Delete	Share	Tags	Info		
Locations	\sim		An and a second s						
iCloud Drive				Contractinguese Contracting Co					
On My iPad		I		E					
Drojects — Merlin Server		Create Proje	ct	My Project					
Becontly Delated				Today at 11.50 Alw					

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
	Сору	
Locations Mein Projekt		
iCloud Dr iCloud Drive	>	
On My iP On My iPad	>	4:34
Drojects Projects — Merlin Server	\sim	
Recently		