



# MerlinX Extension

For Adobe Creative Cloud Applications

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# Introduction

The MerlinX Extension is an Adobe Extension that makes it easy to access your MerlinX Digital Asset Management system from within your favorite Adobe Creative Cloud application. The extension allows you to locate assets either by searching or through user-defined asset collections.

In addition to helping you find assets, the extension also helps you work on them. As your creation evolves, you can periodically send it to your Merlin server through a process called “checking it in”. The server keeps track of each version of the asset you check in, so it is possible to revert changes that are not desired.

This guide explains how to get the most out of the MerlinX Extension. Once you have the extension installed and you have connected to your server, the *Overview* and *Getting Around* sections help you become acquainted with navigating your MerlinX server from within the extension. After that, the *Working With Digital Assets* section explains how best to use and evolve your creative works.

# Installing the Extension

MerlinX Extension is published through the Adobe Extensions Marketplace (<https://www.adobeexchange.com/creativecloud.html>). Before you get started, it is a good idea to visit the Exchange Marketplace to ensure that the MerlinX Extension is listed as an Extension that is available to you. To do that, follow the Exchange Marketplace link and look for “My Exchange” on that web page. Follow the My Exchange link and you will see a list of all of the Extensions you can use. Among those listed, you should see “MerlinX Extension”, and there should be a button next to it. If the button reads “Install”, you will need to click on it to place the extension on your system.

The Adobe Creative Cloud control panel manages the installation and updating of the MerlinX extension. It might take a few minutes for the Creative Cloud control panel to process the installation, but once it does, you should receive a system notification informing you that the operation has completed.

The MerlinX Extension is not available for every Adobe CC application. As mentioned above, the My Exchange webpage lists all of the Extensions available to you. You can determine if your desired CC application is supported by the MerlinX extension by clicking on the extension’s icon. This will load a new web page, and among the information provided is a summary of Adobe CC application compatibility.

# Logging In

This section explains how to locate the MerlinX Extension within an Adobe CC application. It follows by describing how to use the extension to establish a connection to your Merlin server, and it ends by explaining how to log out in order to end your Merlin session.

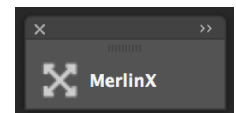
## Accessing the Extension

When extensions are added to Adobe CC applications, they are not initially visible when the application launches. Instead, you must access the extension from the Window menu. First, click on the Window menu in the CC application's menu bar, and then look for the Extensions submenu within it. Once you have moved the cursor to the Extensions item, a submenu will appear, and you will see that it contains a "MerlinX" item. Select that item to reveal the MerlinX Extension.

## Collapsing and Docking the Extension

As stated, the MerlinX Extension is always available from the Window → Extensions menu. However, there are more convenient ways to access it.

In the upper-right corner of the extension's panel, you will find right-facing chevrons (arrows). Clicking on this icon causes the extension's panel to shrink such that it displays only its "MerlinX" title and icon (as shown).



In this minimized form, it is possible to dock the extension within one of the host application's toolbars. Simply drag the minimized MerlinX extension to the desired position within a toolbar, and it will highlight the location at which the extension can be placed. Releasing the mouse button will drop the minimized extension at the desired position, and you will be able to find the MerlinX extension in that toolbar going forward.

## How to Log In

In order to connect to a Merlin server, you need to know your server's network address, and you need to have a valid user name and password for that server.

### Specifying a Merlin Server

The server's network address will look something like "[myorganization.merlinone.net](https://myorganization.merlinone.net)". In the extension's Log In panel, click on the line that reads "server", and enter the network address there. If you have trouble connecting (after specifying your user name and password), you might need to add "/"mx" to the end of the network address. In our example, the network address would then read "myorganization.merlinone.net/mx". Please note, the "myorganization" part of the address is solely for the purpose of example, and for you it will be some value that is appropriate for your particular organization.

### Specifying Your Name & Password

The Log In Panel's "user" field accepts the user name for your account on the Merlin server, and the "password" field is where you enter your login secret. The text entered into the password field is obfuscated.

### Connecting

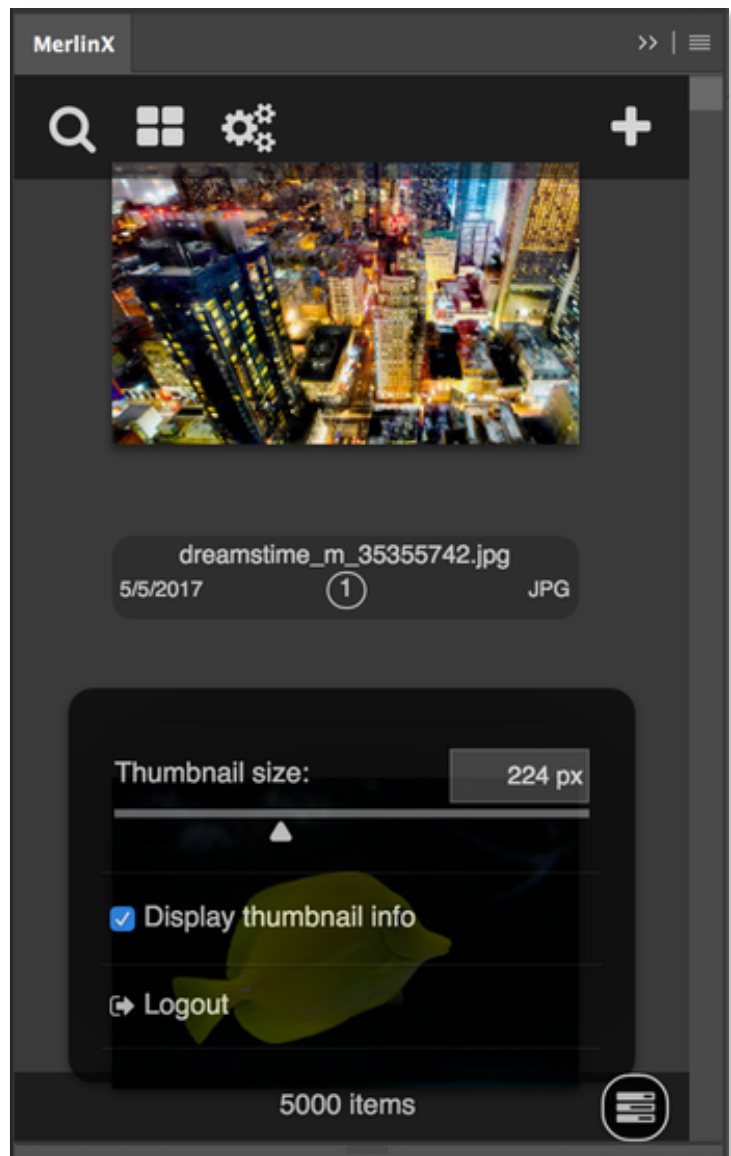
Once all three fields on the Log In Panel have been completed, click on the "Connect" button to log in. If the connection is successful, the extension will reveal assets stored on the Merlin server. If an error occurs, you will see an error message in the upper-right corner of the panel. If that happens, make any necessary corrections and try again. This information (other than the password is sticky, and will be available for future logins.



The Log In Panel

## How to Log Out

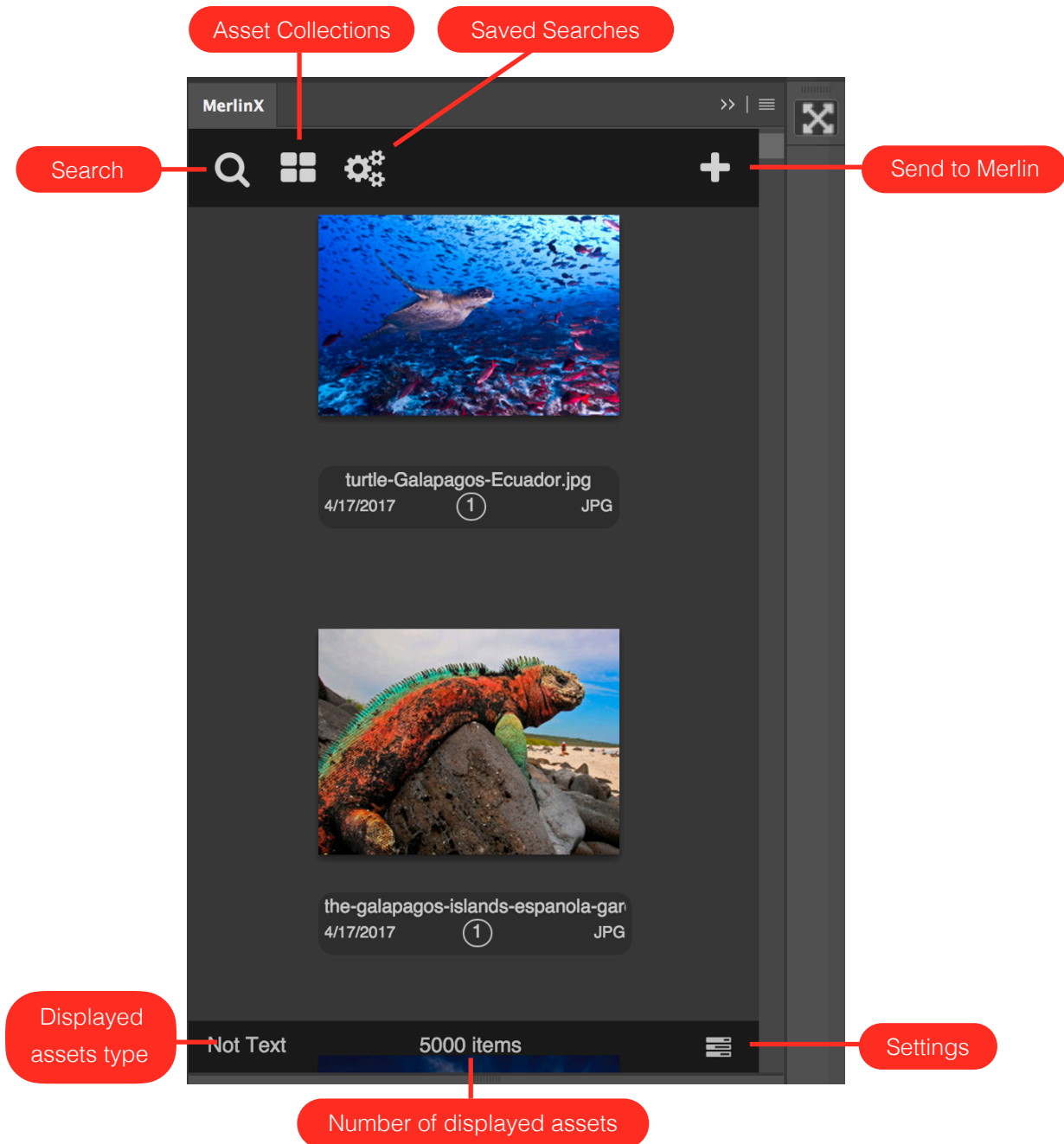
If you need to end your Merlin session, the Logout option can be found in the extension's settings panel. Simply click on the button in the lower right corner, and then choose the Logout option from there.





# Overview

Following a successful login, the extension's Asset Browser Panel is presented. The Asset



The Asset Browser Panel

Browser is responsible for helping you locate and use items of interest from your Merlin server. The bar at the top of the browser is called the *Toolbar*; its upper left corner features

controls for locating assets, and its rightmost corner provides a control for sending your work back to a Merlin server. At the bottom of the Asset Browser is the *Status Bar*, which provides information about the number and type of assets that are currently displayed. In addition, the Status Bar's rightmost corner offers a button for altering the extension's settings.

The extension's panel is resizable, and it can be made to use as much or as little of your Adobe CC app's window as you desire. To resize it, position the mouse cursor at any of the panel's edges (top, bottom, left, or right). You have correctly positioned the cursor when you see it change to resize arrows. When that happens, click and drag the edge of the panel in the desired direction to change the panel's size.

The following sections provide more detail about how to use the extension to locate assets, how to customize its display, and how to use it to share and manage your creative works.

# Getting Around

This section explains how to browse assets that are stored on your Merlin server from within the MerlinX extension. The features described here are presented in translucent panels, called “popovers”, which appear when you click on a feature’s corresponding button. A popover panel can be dismissed by clicking the feature’s button a second time, or alternately, by clicking just outside of the popover.

## Locating Assets

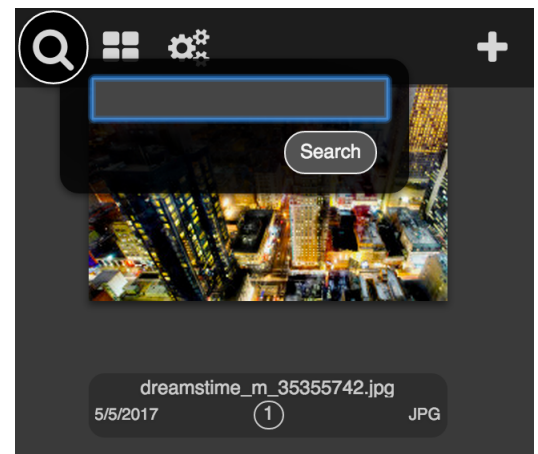
There are three primary ways to locate assets within the extension, and all three appear in the upper-left corner of the Asset Browser panel. The “Search” button accepts free-form text and attempts to find assets by relevance. The “Collections” button presents the hierarchy of user-defined asset collections from Merlin. Finally, the “Saved Searches” button displays the hierarchy of useful, commonly-used searches that were created on your Merlin server. The following sections explain each of these in greater detail.



### Search

MerlinX is capable of storing millions of digital assets, and sometimes the best way to find the one you are looking for is to search using something you know about it. The “Search” button (magnifying glass) serves this purpose. When you click it, a popover will appear and present a text field. Simply enter the relevant search terms or keywords into this field, and then click on the “Search” button to execute the search.

Once the search completes, any assets it found will replace those that are currently displayed within the browser. The number of items it found is displayed in the center of the status bar, and the terms that contributed to the search results appear at the left edge of the status bar.



The Search Popover



### Collections

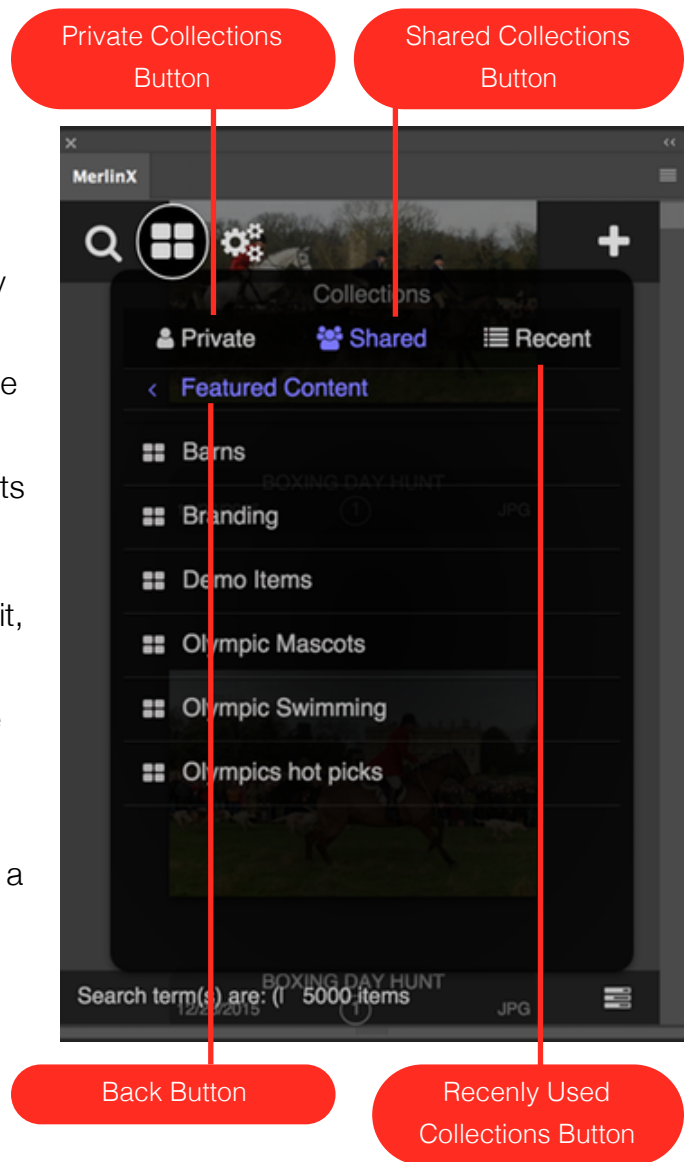
MerlinX offers users the ability to create custom asset groupings called “Collections”. These cannot be created directly within the MerlinX Extension, but the extension is capable

of browsing those created on the Merlin server. To do so, click on the “Collections” button in the toolbar to reveal the Collections popover.

The Collections popover presents buttons for three individual Collections hierarchies:

Private, Shared, and Recent. The collections presented within the Private hierarchy are visible only to your user; other users cannot view or modify them. The opposite is true of the Shared hierarchy; the collections displayed there can be viewed or modified by other users of the Merlin system. The Recent button is simply a list of the collections that you used most recently, ordered from most to least recent. Use the recent button when you want to return to a collection without having to drill down through its corresponding hierarchy to find it.

When you click on a hierarchy button to select it, it turns blue (as shown in the image), and the items displayed below will change to reflect the newly selected hierarchy. Navigation is performed in a manner very similar to modern mobile devices. Collection groups appear with a right-facing arrow next to them, indicating that you will drill down a level when you click any of them. If you decide you want to back up a level after navigating into a group, you can do so by clicking on the back button that sits atop the Collections list. The back button displays a left-facing arrow with the name of the current folder to the right of it (see the illustration titled *The Collections Popover*).



The Collections Popover

Individual collection items are presented with the collection icon to the left of their name. If you click on one of these, the popover will close and the assets stored in the collection will be displayed within the Asset Browser.



## Saved Searches

Some MerlinX users find that they have occasion to repeatedly perform the same search. Rather than forcing these users to manually enter search criteria each time, MerlinX offers the Saved Searches feature as a way to have the system remember search criteria for you. When a Saved Search is created, it is given a name, and it can optionally be grouped within a folder in the Saved Searches hierarchy. To perform a Saved Search, the user needs only to locate it within the hierarchy and click on it, at which point the search results will be displayed within the Asset Browser.

The Saved Searches popover is similar to the Collections popover. It offers Private, Shared, and Recent hierarchy buttons, and their behavior is very much the same. Recently used Saved Searches can be found by clicking the Recent button, where the list of recently used Saved Searches is ordered from most to least recent.

Refer to the *Collections* section above for a more detailed explanation regarding how to navigate the hierarchies presented in this popover.

## Customizing the Display

Regardless of which method you use to locate assets, the Asset Browser is responsible for displaying them in a manner that is convenient for you. This section explains how to configure the thumbnail grid, size, and whether or not asset metadata appears near each asset's thumbnail image.

### Thumbnail Grid

The MerlinX Extension was designed to work well even when its panel is set to use a minimal amount of space within the Adobe CC application. In this configuration, the Asset Browser will display one thumbnail (or maybe two, depending on size) per row, and the user is expected to browse by scrolling vertically through the asset set. If you find a small panel size too limiting, it is possible to expand the thumbnail grid by clicking and dragging any edge of the extension's panel. Simply position the mouse at the edge of the extension's panel, and when you see the cursor change to resize arrows, click and drag the panel's border to its new size. As the panel is resized, the grid will expand to reveal more thumbnails.

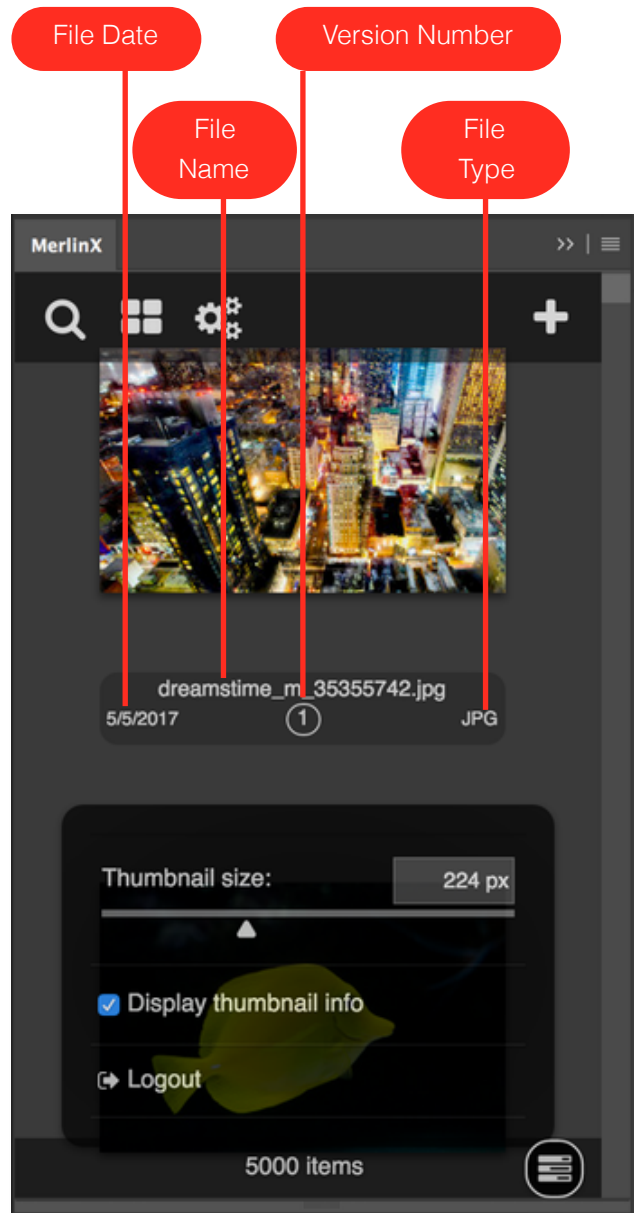
Regardless of the panel size you prefer, it is important to be able to access the extension quickly and conveniently. The chevron arrows (>>) in the upper-right corner of the extension's panel serve to minimize and maximize the panel. For further details, please refer to the *Collapsing and Docking the Extension* section of this document.

### Thumbnail Size

Should you desire to change the size of the thumbnails presented in the Asset Browser, you can do so from the Settings popover, which can be accessed by clicking on the settings icon in the lower-right corner of the extension's panel (as shown). The "Thumbnail size" slider is responsible for sizing the thumbnails. Slowly slide it left or right until the thumbnails appear at the desired size. If you would rather, you can also type a specific thumbnail size into the text box that sits atop the slider.

### Thumbnail Info

The illustration, *The Settings Popover*, shows the information that can accompany each thumbnail in the Asset Browser. Depending on how you work, the appearance of this metadata could be either helpful or distracting. For the latter case, the Settings popover offers the ability to hide this thumbnail information. Simply uncheck the "Display thumbnail info" checkbox to remove it from the browser.



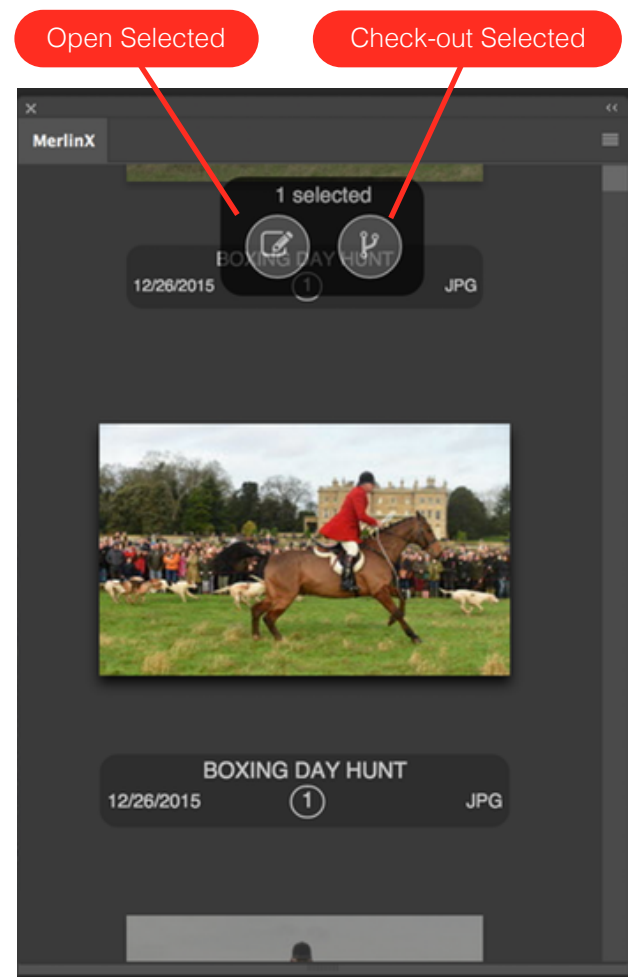
The Settings Popover

# Working With Digital Assets

While the *Getting Around* section explained how to locate the assets you want to use, this section details how to access and enhance the assets stored on the Merlin server. Before you get started, it is important to understand the selection behavior in the MerlinX Extension. Clicking on an asset will select it, and you can tell which items have been selected because they grow slightly as they “pop out” of the Asset Browser. Items that have not yet been selected take on a dimmer appearance. You can continue to select as many additional items as you like by clicking on them. If you once again click on a selected item, the item will shrink as it becomes de-selected. To clear all of the selections, click on the panel background away from other items.

As you select items within the Asset Browser, the Toolbar and the Status Bar are both hidden and a selection indicator appears. The selection indicator also displays circular buttons representing the operations that can be performed for (at least one of) the selected items. To request that a particular action before performed for the set of selected items, simply click on one of the action buttons within the selection indicator.

In the following sections, we first look at how to open the assets you find in your Adobe CC application. From there, the discussion moves to how asset versioning can help you evolve your work. Finally, this section concludes with an explanation about how both new and/or modified assets can be uploaded to your Merlin server.



A Selected Asset in Photoshop.  
InDesign has a different tool





## Opening Assets

To open an asset, first select it and then click on the circular open button that appears within the selection indicator. Because the various Adobe CC applications are themselves editors, the open button's icon depicts an edit operation as it shows a pencil marking up a document. If the open button does not appear, then your Adobe CC application is not capable of opening any of the selected assets directly. You will have to use a different application to make changes to them.

After clicking on the open button, the extension will display a progress indicator as it acquires the desired asset (or assets) from the Merlin server. As each asset is made available, it will appear in its own window within your Adobe CC application. At this point, you are free to work with the asset as you normally would.

## Asset Versions

The creative process is an iterative one. As your work evolves, it is wise to periodically send it to your Merlin server where its various versions will be kept. This way, if you find you took a wrong-turn in later versions, you can restore a prior version and continue your work from there. This section explains how to check-out, check-in, and revert your creations.



## Checking Out

In order to send a changed asset back to the Merlin server, it must first be checked out. There are two ways to do this: you can check it out from the moment you start working on it, or you can check it out only after you have completed your modifications and you are ready to place it back on the server.

If you use the “Check-out” button to acquire the asset, you are reserving the asset for exclusive use – other users will not be able to open it or check it out themselves. Sometimes this is desired, as it mitigates the risk that somebody else might work on an asset concurrently and inadvertently overwrite your changes. When an asset is checked out, its appearance in the Asset Browser changes slightly. Instead of casting a shadow on the browser's background, it instead casts a glow and is therefore easy to spot.

If you do not intend to reserve an asset for exclusive use, do not use the “Check-out” button. Instead, open the asset within your Adobe CC application by clicking on the



“Open” button (see the *Opening Assets* section). You are free to work on the asset and save changes to it even though it has not yet been checked out. During this time, other users are also free to open and work on it. When you are ready to check it in, use the toolbar’s “Send to Merlin” button as described in the *Sending Assets to Your Merlin Server* section.



### Checking In

Changes made to checked out assets are sent back to the Merlin server through the “Check-in” process. There are two ways to check in an asset: you can locate a checked-out asset in the Asset Browser and do it there, or you could use the “Send to Merlin” button at the right edge of the Toolbar to check in your Adobe CC application’s active document.

To check-in an item using the extension’s Asset Browser, start by locating the checked-out item and then select it. Checked-out assets are easy to identify, because they cast a glow on the browser’s background instead of a shadow. Once you have selected one or more items to check-in, click on the “Check-in” button that appears in the selection indicator – it is represented by a plus (+) icon. After doing so, you will be presented with a dialog box that gives you the opportunity to provide a comment to associate with this new version, and two action buttons permit you to either complete the check-in or cancel the operation.

If you are actively working on an asset from your Merlin server within your Adobe CC application, there is no need to hunt it down in the Asset Browser in order to check it in. Instead, you can simply click on the “Send to Merlin” button (+) near the right edge of the Toolbar. When you do this, the extension will first check to see if the asset is checked out. If it is not, it will be checked out for you. After that, it will initiate the check-in process and solicit a version comment before finally sending your changes to your Merlin server.

When a check-in operation completes, the glow will be removed from the asset’s thumbnail and its version number will increase (the version number is the value displayed within a circle below the thumbnail).



### Reverting

The “Revert” button will only appear if an asset is currently checked-out. It is used to restore an asset to its state prior to being checked out. If you have modified an asset and

you choose the revert option, a dialog box will ask you to confirm the operation, because the changes you have made will be discarded. If you are reverting an unmodified asset, no confirmation is required and the check-out will be canceled as the revert operation completes.



## Placing Assets in InDesign

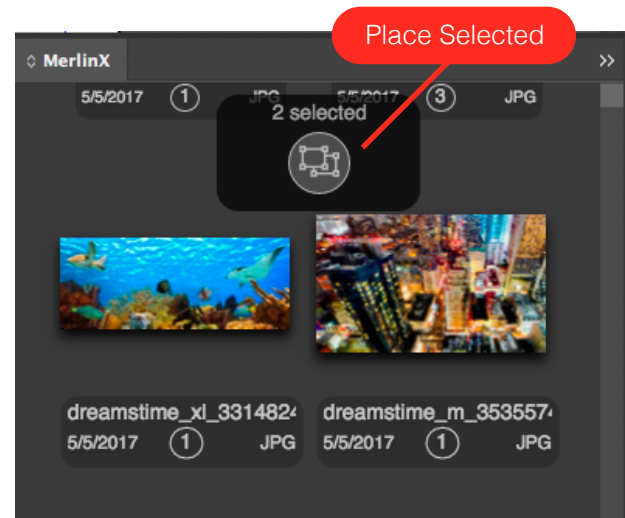
To place assets within Adobe InDesign CC, first select one or more items and then click on the circular “Place” button that appears within the selection indicator. If the “Place” button fails to appear, your Adobe CC application is not capable of placing any of the selected assets directly. You will have to download the content using the MerlinX web tool and employ an alternative workflow to place your items.

After clicking on the “Place” button, the extension will display a progress indicator as it acquires the desired asset (or assets) from the Merlin server. If you chose to place a single asset, it will be pinned to your mouse cursor where it can then be dropped into an existing frame, or you can choose to drop it on an empty area of the page and have a new frame created for it. If you chose to place multiple assets, each will appear, one by one, in its own frame within your Adobe CC application. At this point, you are free to work with the asset as you normally would.

As an alternative, a user may first draw a “frame” in their document, then place a selected item from Merlin. Merlin will place the item inside the frame of the InDesign document.

### Automatic Update of Placed Assets

For applications that support placing assets, the MerlinX Extension will takes steps to ensure that you are always working with the most up-to-date versions. When a newer version of a placed asset is detected on your Merlin server, the updated asset will automatically be downloaded and made available to the host application. Within InDesign, you are notified by a yellow warning indicator icon whenever an automatic update happens.



There is no need to fear data loss as a result of the automatic update procedure. If you have made changes to an asset that has also been placed in a different Adobe CC application, the local version of the asset will be preserved even if a newer version exists on the Merlin server. This condition will persist until you either check in your document, or you choose to discard your changes by reverting it (see the *Asset Versions* section for details).

## **Sending Assets to Your Merlin Server**

When it comes to sending your work to a Merlin server, assets fall into two categories: those that were acquired from the server and those that were not. While the information collected differs depending on which type you are sending, the process is initiated in the same way. To send your active document from your Adobe CC application to a Merlin server, click on the “Send to Merlin” button (it is the large “+”) near the right edge of the Toolbar in the extension’s panel. Doing so will initiate either the *Modified Asset* procedure or the *New Asset* procedure, both of which are described in the following sections.

### **Modified Assets**

If the extension determines that the active document in your Adobe CC application is one that was acquired from your Merlin server, it will begin a check-in sequence. It begins by ensuring that your active document has been checked out, and if it has not, the document is checked out for you. Next, the Check In dialog will appear and give you an opportunity to provide a version comment and either proceed with the check-in or cancel it. If you choose to proceed, your active document will be automatically saved, tagged with the provided comment, and uploaded to your Merlin server. During the check-in process, the document file is locked, so you cannot save changes until the procedure completes.

### **New Assets**

From the MerlinX Extension’s point of view, any asset that is not stored on the Merlin server is a “new document”. When you have such a file open and you click on the “Send to Merlin” button in the Toolbar, it initiates a document import sequence. The illustration, *Sending a New Asset to Merlin*, shows the popover that appears in this case. You are given the opportunity to provide a file name, the file type, and a comment to associate with the initial version of the new asset. The extension does its best to ensure that the file type suggested for import matches the original type of the file.

The import procedure begins when you click on the “Send” button in the popover. A progress indicator will be displayed as the system adds your asset. During this time, the document’s file will be locked, so changes cannot be saved until the sequence completes. Nevertheless, you are free to work on other documents, or to make *unsaved* changes to the one being added, during the upload procedure.



Sending a New Asset to Merlin