*Project**Wizards*

MERLIN SERVER

The Quick Start Guide
for collaborative project management

PREF

INTRODUCTION

Welcome to this quick start guide for Merlin Server!

Thank you for choosing the leading software solution for project management on the Mac. This document will introduce you to Merlin Server's basic functionality.

System requirements

To run Merlin you will at least need an Apple Macintosh computer with G4 processor and Mac OS X 10.4.11 or later. We highly recommend the latest version of Mac OS X 10.6. **Merlin 2.7.x is required since previous versions of Merlin can not access the projects shared with Merlin Server.**

Free Trial mode

The trial mode allows you to run Merlin Server with Web-Sharing at 15 minute increments. After this period, Merlin Server must be restarted. All functions of the iPhone-Sharing are activated for projects with up to 40 activities. The 15 minute time limit also applies.

HELP AND SUPPORT

For assistance and support please visit our website:

- ▸ www.projectwizards.net

We also invite you to take advantage of these additional support resources:

- ▸ Merlin 2 help

- ▸ Google groups (in <u>English</u> and <u>German</u>)

Or contact our support team directly:
<u>support@projectwizards.net</u>

INSTALLING MERLIN SERVER

Merlin Server is a "Preferences Pane":

(1) Double click on *"MerlinServer.prefPane"* to automatically start it.

1

MerlinServer.prefPane

2

The "Merlin Server" preference pane must be installed before you can use it. Do you want to install it now?

○ Install for this user only
● Install for all users of this computer

When you click Install, you'll be asked to enter the name and password for an administrator on this computer.

Cancel   Install
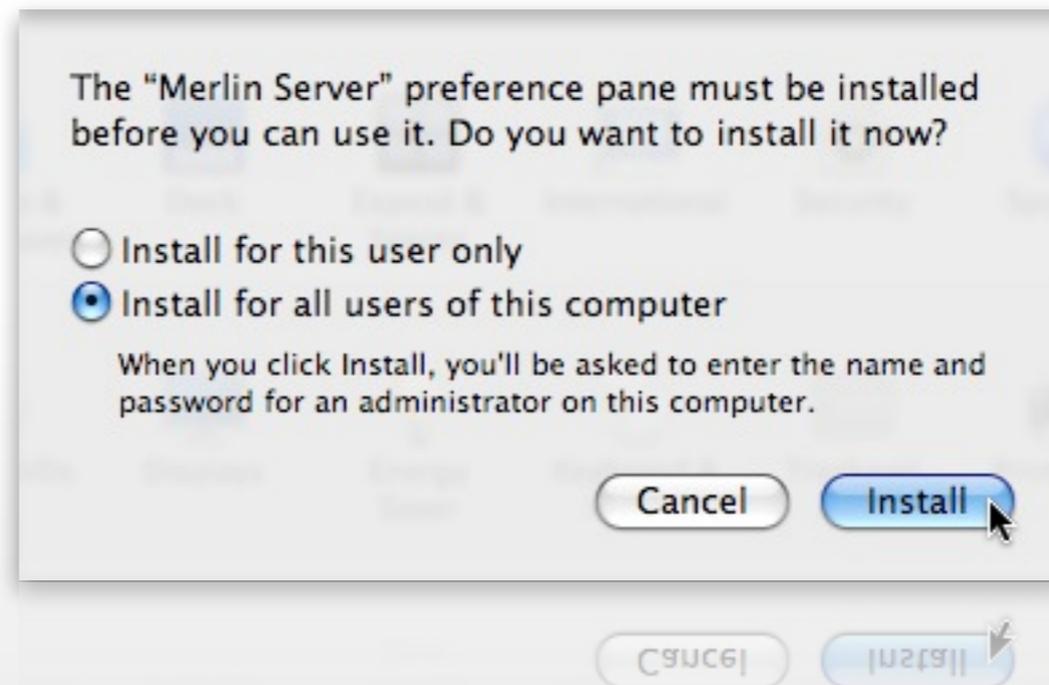
(2) Install configuration. Please ensure that you have the permissions of a system administrator when installing. Select one of the installing options and click the "Install" button to install Merlin Server.

OPENING MERLIN SERVER

Open System Preferences. Merlin Server is located in the "Other" category.

By clicking on the Merlin Server icon, the pref pane will open.
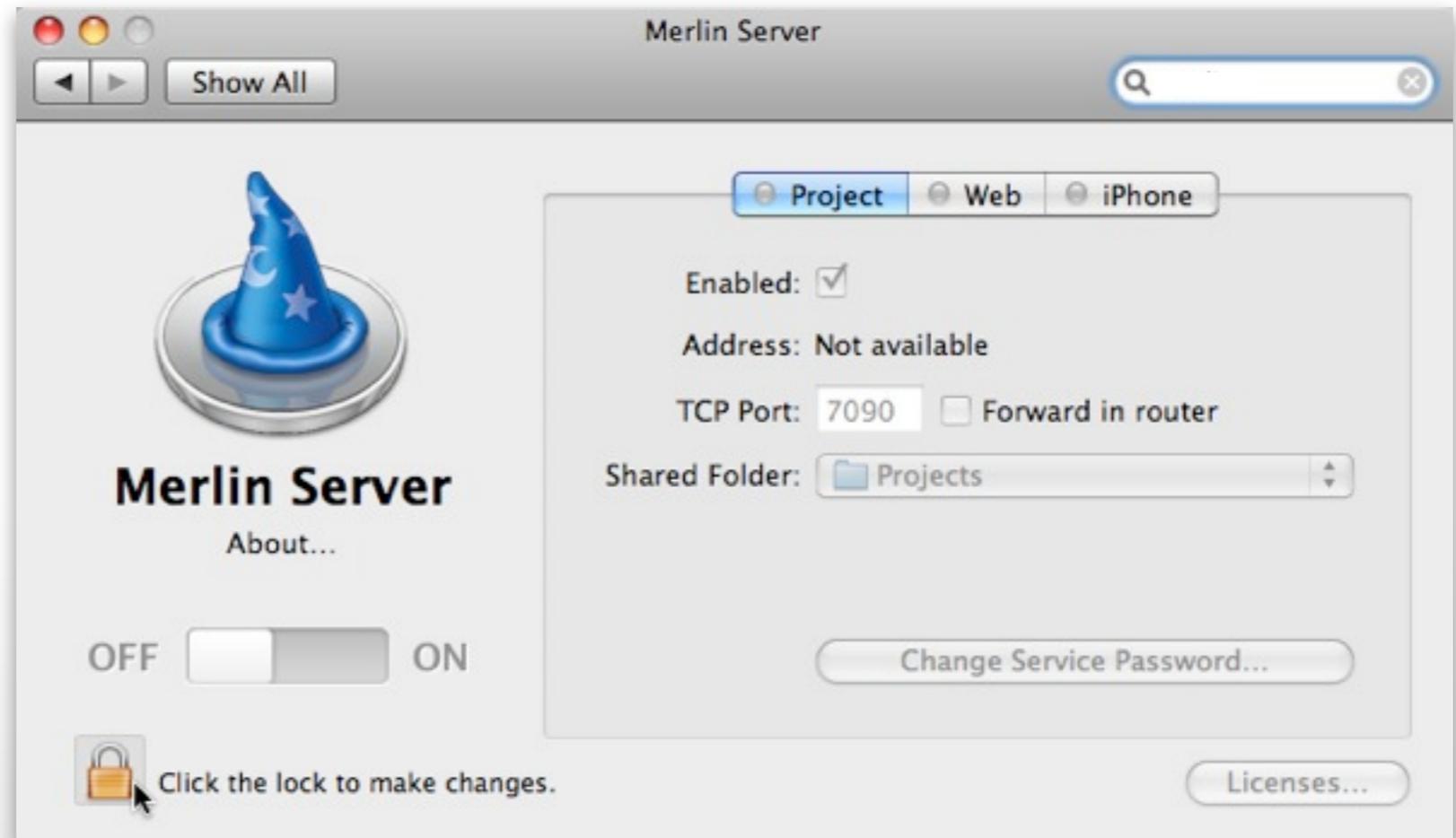
To access Merlin Server settings, click the lock. You need valid permissions as system administrator to make changes.

MERLIN SERVER LICENSE

Click on the "Licenses…" button and you will find two options to view Licensed Features, including the quantity being used, and the License files installed.

Here you can also add, register or purchase additional licenses.
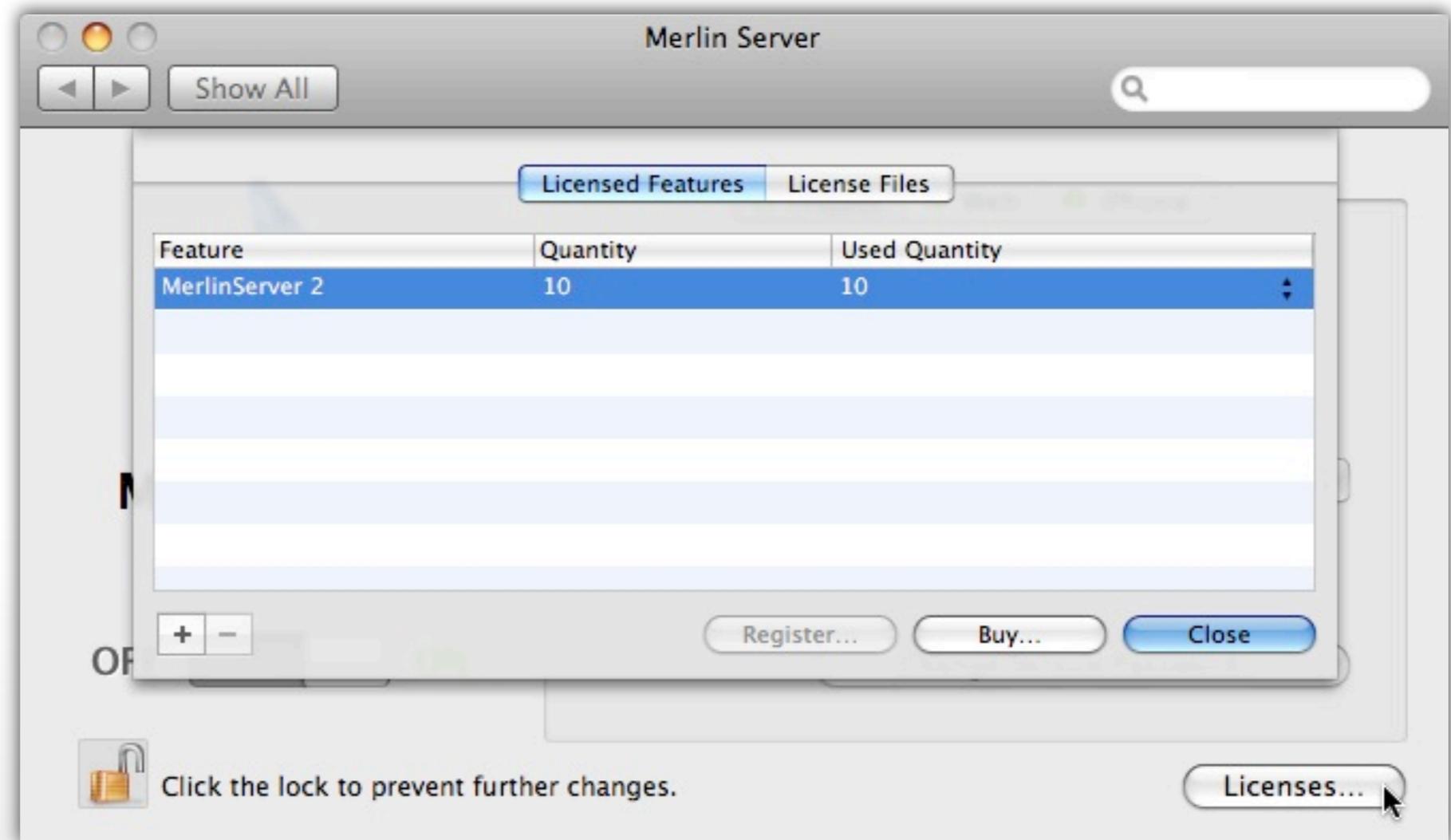
Merlin Server ships with Project-Sharing, Web-Sharing and iPhone-Sharing included.

MERLIN SERVER CONFIGURATION

Information about Merlin Server

On/Off slider

Protect Merlin Server settings from unauthorized changes

Tab access for each service

Configuration settings for selected service

License information

Changes can only be made when Merlin server is not running. Changes can include settings for Shared Folder and Service Password then. At time of server restart, changes will be reflected.

SHARED PROJECTS

The default folder for sharing is *"Projects"* located in the path *"Library > Application Support > Merlin Server"*. It contains all projects for publishing. A new folder can be assigned for sharing by selecting *"Choose…"* from the Shared Folder area.
Tip: Click on "Projects" to open the folder automatically in the Finder.

USING THE SHARED FOLDER

All files located in the shared folder will be used for publishing over the sharing service of Merlin Server. Please move all needed project files into this shared folder.

To use the project files with the Merlin Server you have to move them into the shared folder manually from the Finder. For this, you will need administrator access rights to authenticate yourself. This folder can be shared for other users, bit it has to be configured in order to <u>Share</u> .
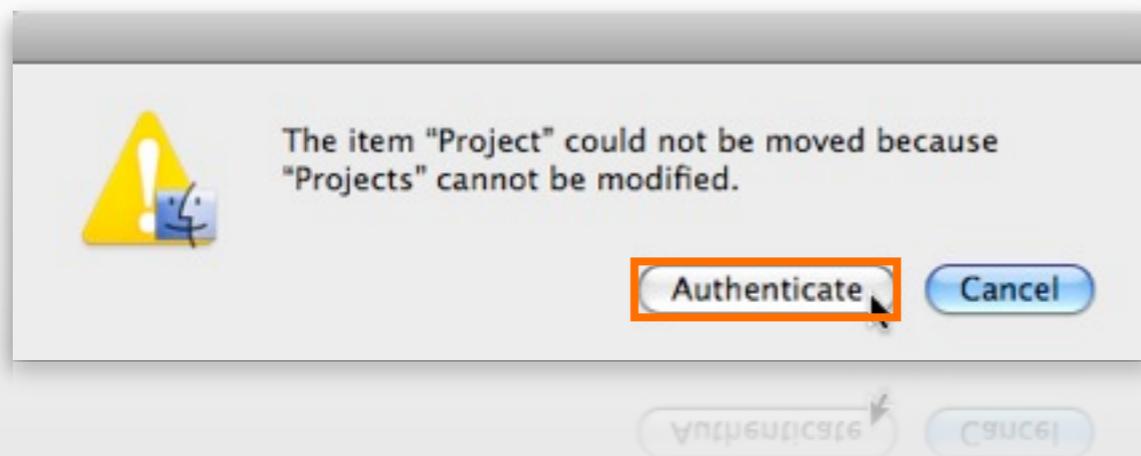
Tip: To instantly access the "Projects" folder, drag it into the side bar of the Finder window under the "*Places*" category.
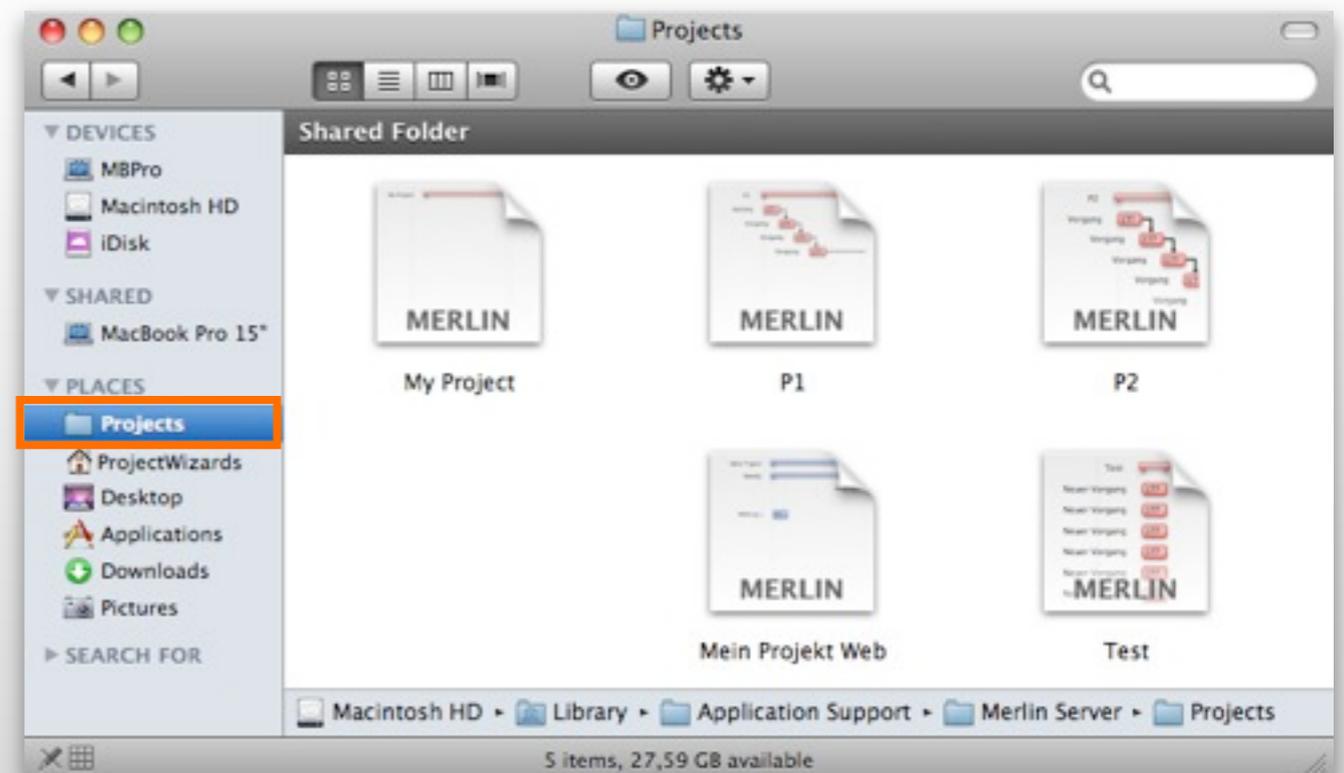
SHARE

In order for other users to directly access the Shared Folder over the Finder, they have to be assigned special rights. These permissions can be configured in the Finder using the Get Info command.

Place a check mark for the "Shared folder" option in the Get Info window. Custom rights are used when setting the security. Any user who will have access to the Shared Folder should be assigned the "Read & Write". To change these setting, you must first open the lock in the lower right corner using your administrator permissions.

New users can be added to the list using the "+" button, after which you can configure their permissions.

Mac OS X 10.4 Tiger users will require the Mac OS X 10.4 Server.
For a 10.4 Client there are several third-party applications available:
http://www.hornware.com/sharepoints/
http://www.mikey-san.net/sandbox/
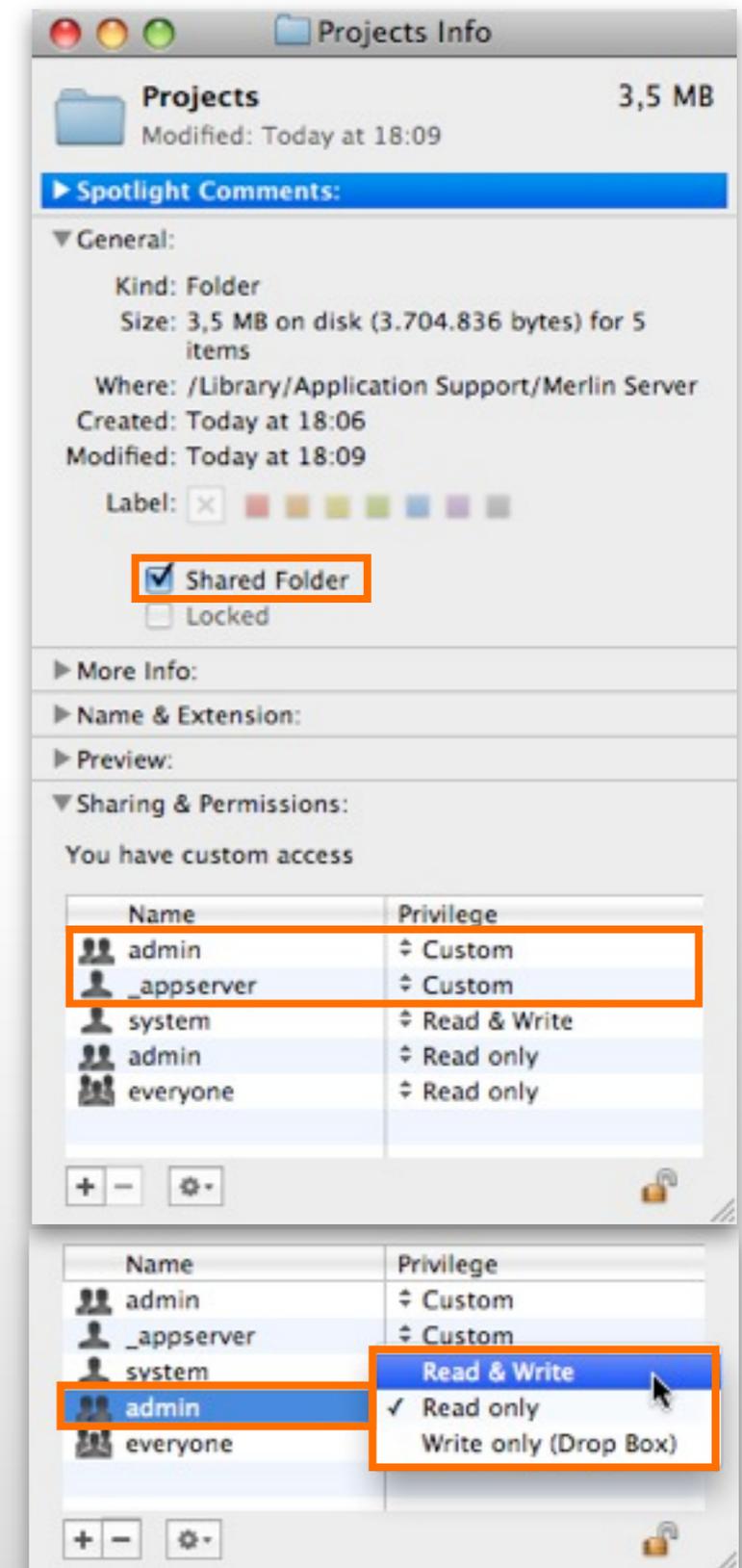
STARTING MERLIN SERVER
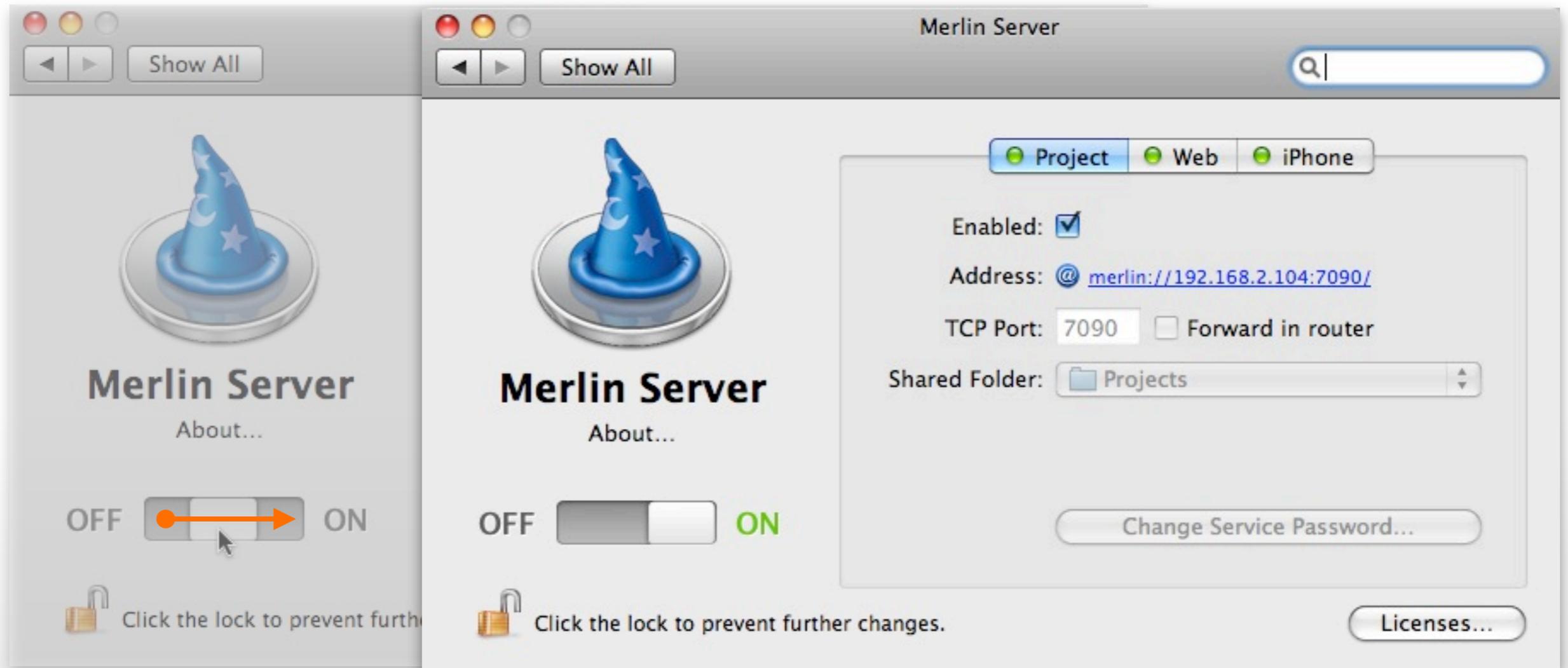
Start the Merlin Server by dragging the slider from "Off" to "On". The Server will then automatically publish all projects from the Shared Folder. The active services are indicated with a glowing green light. Merlin Server is now running.

FIX PERMISSIONS

It can be, that there was an issue copying the projects to the Shared Folder. For that reason the permissions have to be fixed. The privileges for the shared project files can be fixed with a click on the option "Fix Permissions…", which can be found in the Merlin Server pane.

The project files **can not** be used with the server, as long as the permissions are not fixed.

ACL: ACCESS CONTROL LIST

Mac OS X 10.6 Snow Leopard and 10.5 Leopard use Access Control Lists by default. These lists control all permissions to the system. Merlin Server needs active ACLs in order to function properly.

The ACLs are not active under Mac OS X 10.4 Tiger, but Merlin Server will activate these ACLs automatically when installed.

This means all Mac OS X 10.6.x Snow Leopard, Mac OS X 10.5.x Leopard and Mac OS X 10.4.x Tiger users will use security with the help of active Access Control Lists.

Further information on ACLs can be found on Wikipedia:
http://en.wikipedia.org/wiki/Access_control_lists

PROJECT SERVICE
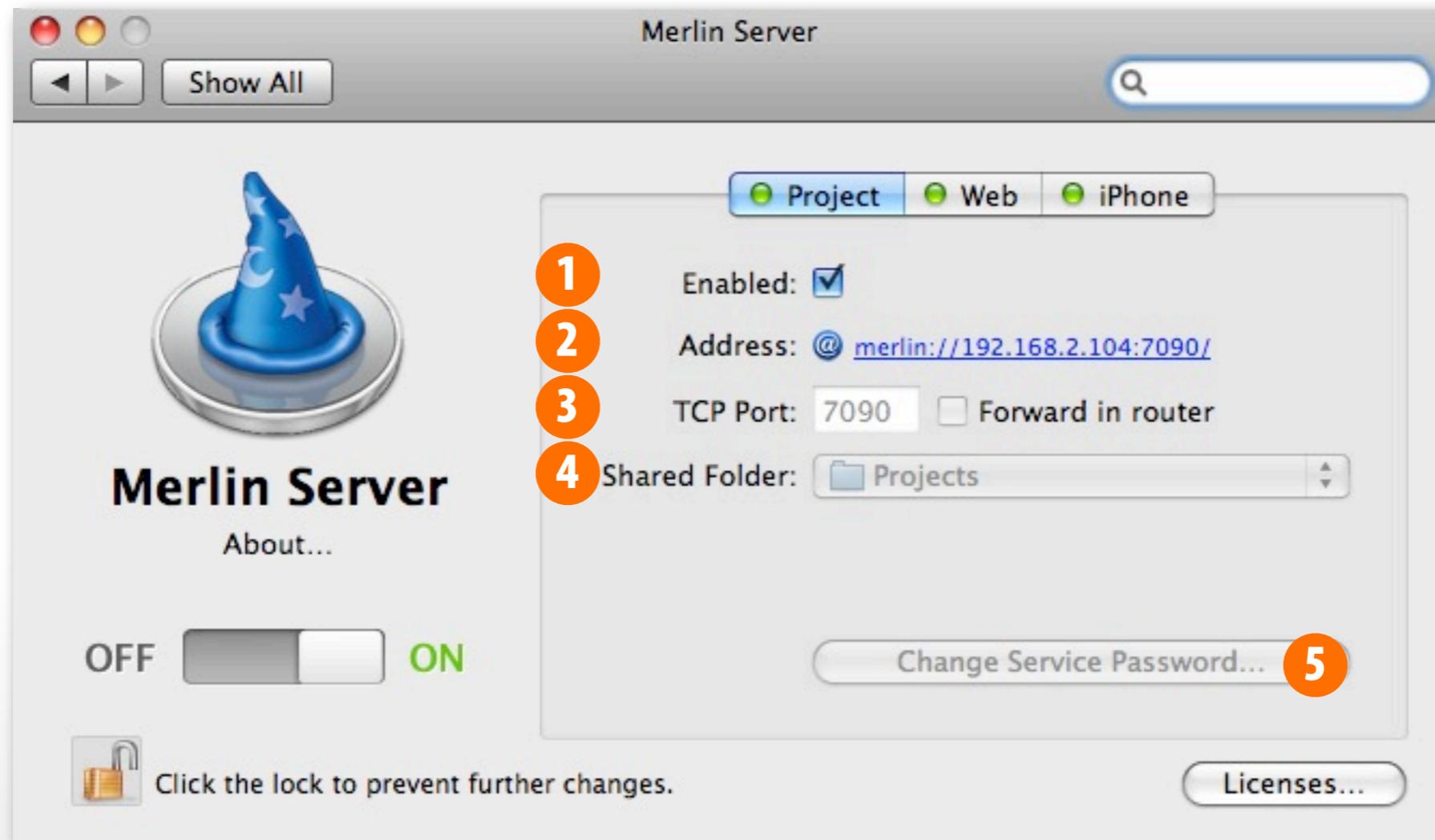
With this option (1) the project service can be activated. The address field (2) shows the actual IP address. To change the Port use the option for TCP Port (3). If your router requires port forwarding, activate the "Forward in router" option. Using the drop down menu (4) you can choose the Shared Folder for the projects. To change the password for the service, simply click on the "Change Service Password" (5) button.

PROJECT SHARING

For the remote-based opening of projects shared with Merlin Server, Merlin 2.7 or later is required. Older version of Merlin will not function. To open a project from the Merlin client select the "File > Remote Open" menu item.
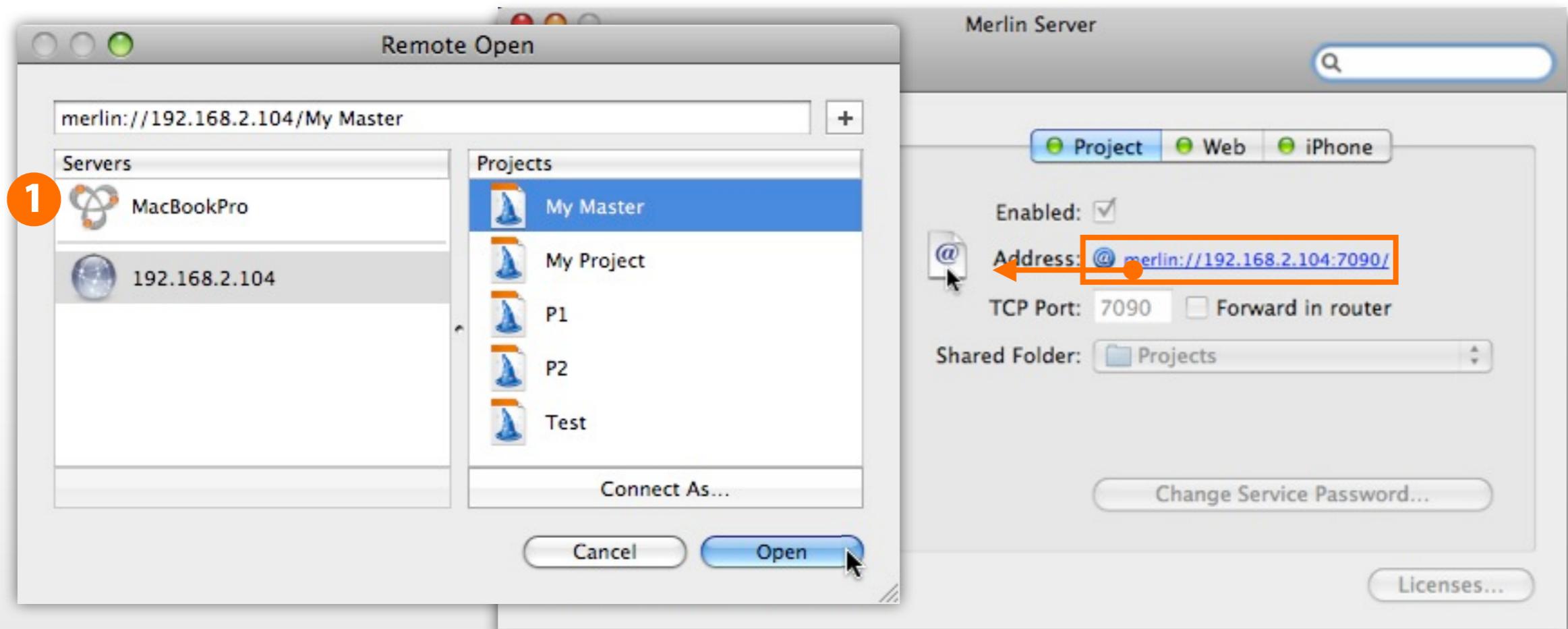
To access and open a project published by the Merlin Server over the internet, you will need the appropriate URL address. This can be distributed to others by dragging the proxy icon directly to Mail, iChat or other applications. Bonjour (1) automatically enables the viewing of any local Merlin Server.

WEB SERVICE

To start the Web Service, please enable it (1). The actual IP address can be distributed to others using the proxy icon from the Address field (2). The default for TCP Port (3) used for the Web Service is "7080". Optionally, this can be forwarded to the router.

WEB SHARING

The following web browsers are supported:

Safari 4.x Mac or Windows

Safari 3.x Mac or Windows

Firefox 3.x Mac or Windows

IE7 Windows

IE8 in compatibility mode

Type the IP address of the Merlin Server in the address field of the web browser

If you don't see the Merlin Web server list displayed, make sure you unblock the Pop-Up windows display settings in the browser.

WEB SERVICES OVER BONJOUR
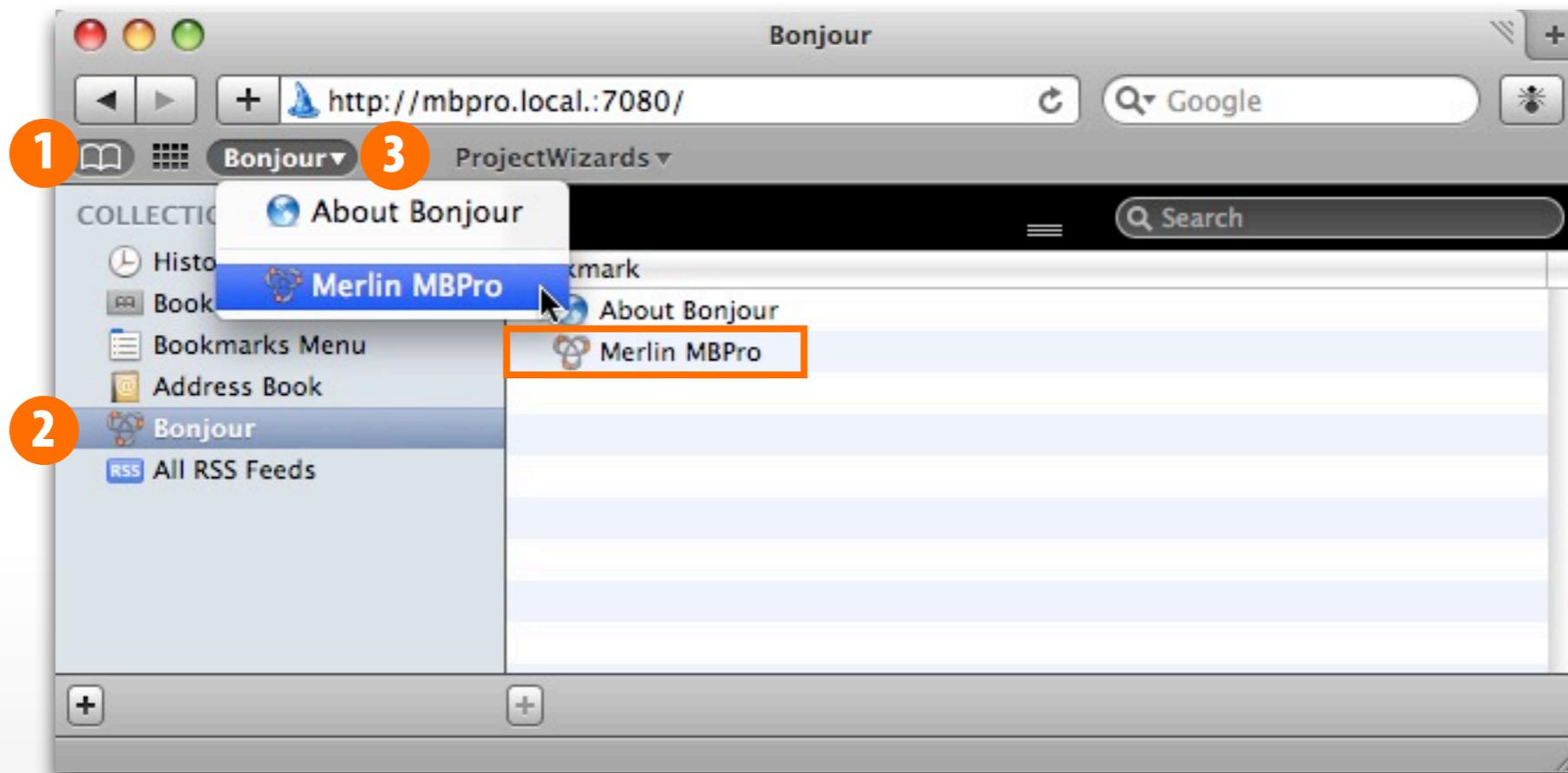
Local Web Services can be accessed directly in Safari with the help of Bonjour. Open the bookmarks menu (1) and select Bonjour (2) under "Collection" panel. If there are any Merlin Servers with an active Web Service, they will automatically display in the list. Click on the Server and the shared projects will open in Safari. You can also access the Bonjour list directly from the bookmarks bar (3). This option can be activated within Safari Preferences under the "Bookmarks" tab.

IPHONE SERVICE
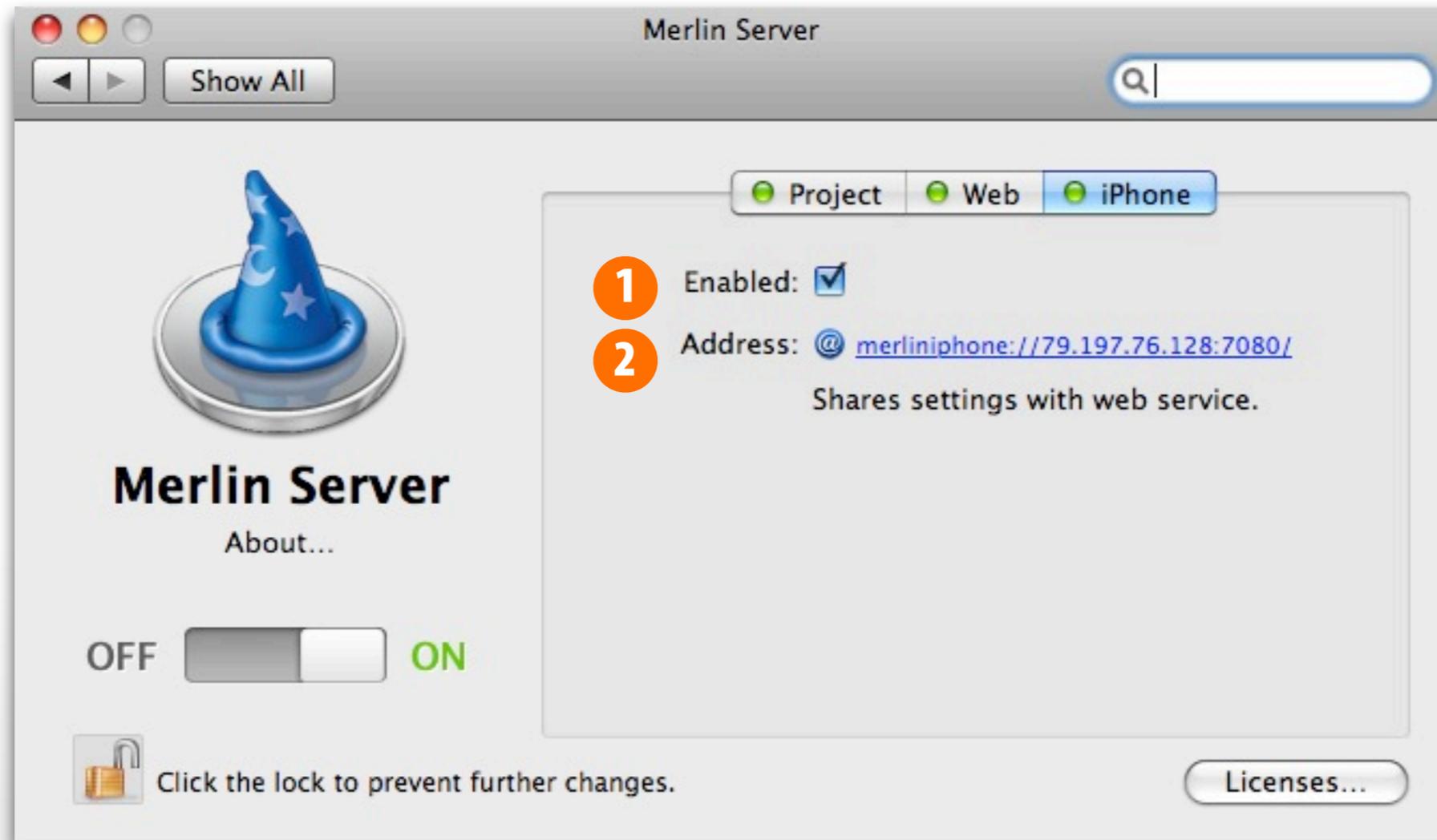
The iPhone Service can be activated by checking the "Enabled" (1) option. The address (2) for this service can be sent per e-mail to an iPhone or iPod touch, or typed directly in Safari on the iPhone or iPod touch. You need "<u>Merlin iPhone</u>" installed on the iPhone or iPod touch to connect to Merlin Server. The iPhone Service shares its settings with the Web Service.

IPHONE SHARING

Start the Merlin app (1) on your iPhone or iPod touch.

Tap the "+" button (2) to add a new server.

In the "Server List" (3), any local servers found by Bonjour (4) will be automatically displayed. In addition, servers already added will appear and display the network icon (5). With the help of the "+" button you can add new servers for use with Merlin iPhone.

In the "New Server" panel (6) you can add the address of the Merlin Server which has an activated iPhone Service. After you have typed all needed information, tap the "Done" button.

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