

# MerlinX

## How-to Guide

for

## HBSSweb users

[hbs.merlinone.net/mx](https://hbs.merlinone.net/mx)

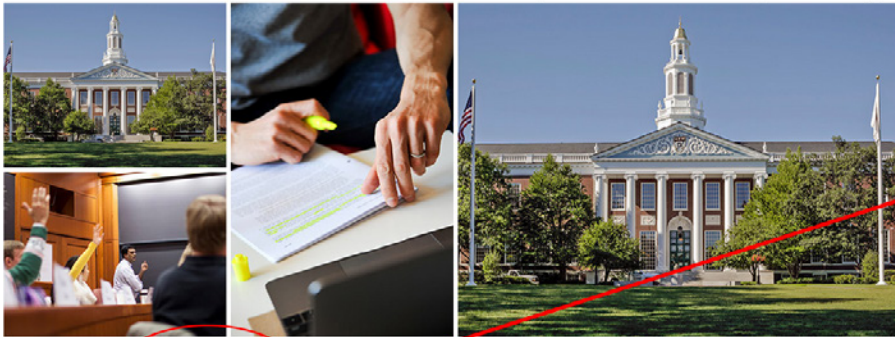
questions? [apestana@hbs.edu](mailto:apestana@hbs.edu)

# INTRO

## 1. LOGIN



your workflow, your way.



UserID:   
Password:

342711, 342720, 342724, 342718 - all photos Harvard Business School  
For any questions or technical concerns, please contact [Micaela Brody](#).

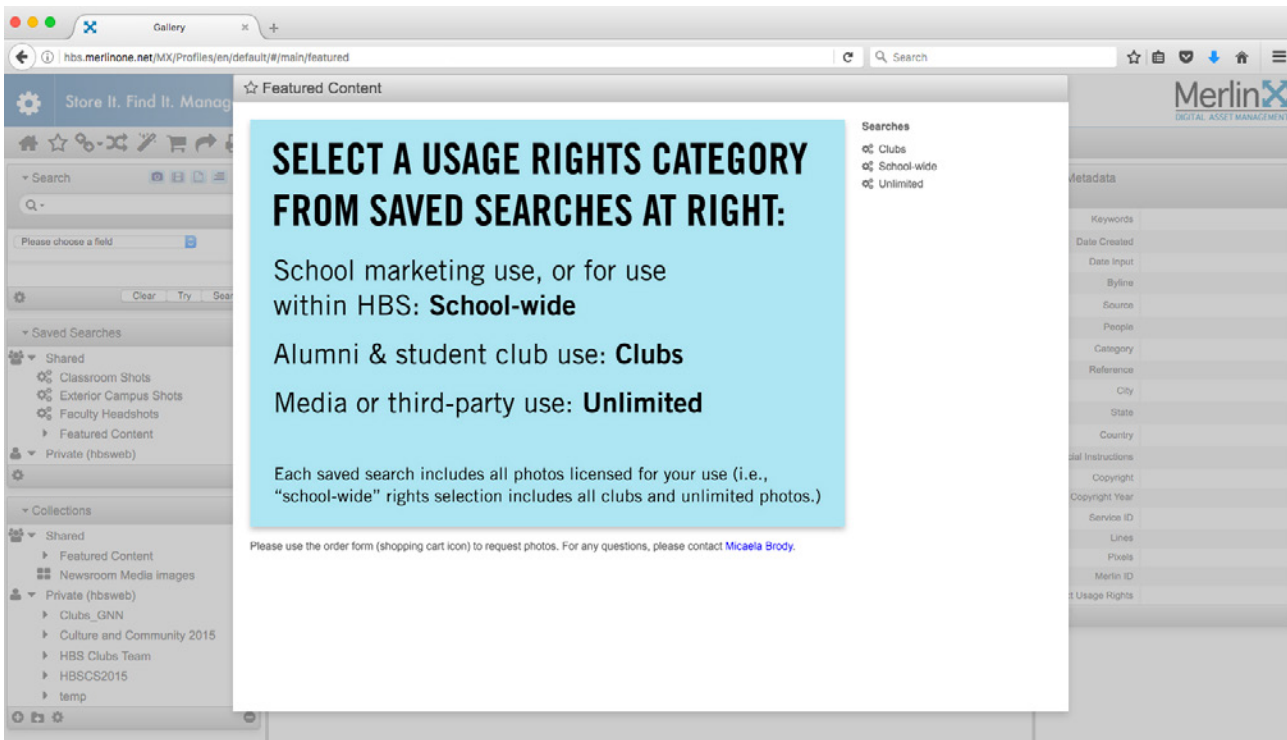
© 2017 MerlinOne

### Login page:

Username: HBSweb

Password: sch00l  
(the password ends with two zeros followed by a lower case L)

Opening screen for HBSweb users:



## 2. FEATURED CONTENT

To begin, select the appropriate usage rights filter from the **Searches** at right, described in the accompanying graphic.

### SELECT A USAGE RIGHTS CATEGORY FROM SAVED SEARCHES AT RIGHT:

School marketing use, or for use within HBS: **School-wide**

Alumni & student club use: **Clubs**

Media or third-party use: **Unlimited**

Each saved search includes all photos licensed for your use (i.e., "school-wide" rights selection includes all clubs and unlimited photos.)

#### Searches

- Clubs
- School-wide
- Unlimited

The images shown will be filtered by the usage rights you selected.

The screenshot displays the Merlin Digital Asset Management interface. The top navigation bar includes the tagline "Store It. Find It. Manage It. Share It." and the Merlin logo. The left sidebar contains a search bar, a "Select Usage Rights" dropdown set to "UNLIMITED", and a "Saved Searches" list with categories like "Classroom Shots", "Exterior Campus Shots", and "Faculty Headshots". The main area shows a grid of 20 image thumbnails, each with a file name and a timestamp. The right sidebar displays "Metadata" for the selected image, including keywords, creation date, and copyright information. The bottom status bar indicates "Search returned 2500 records (of 15498 hits); Sorted by recently input first".

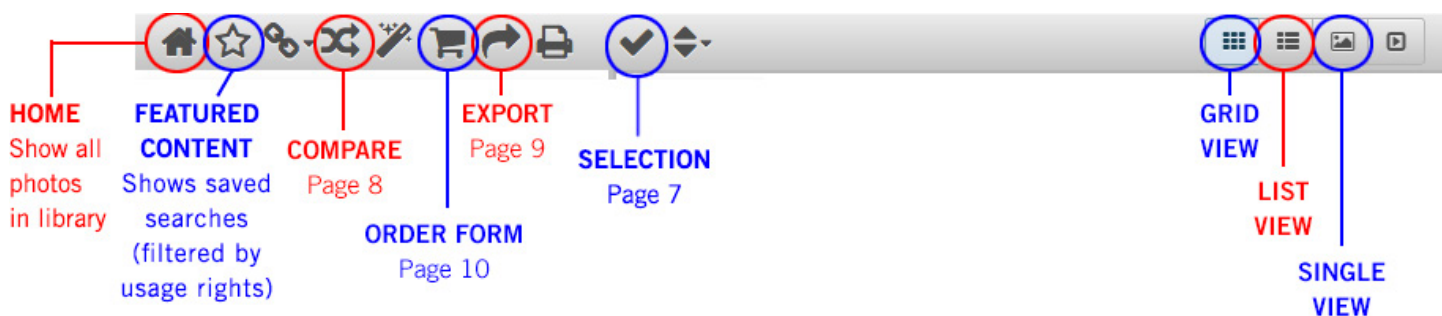
| File Name            | Timestamp         |
|----------------------|-------------------|
| 170425-SY-SYP_194... | 4/25/2017 5:53 PM |
| 170425-SY-SYP_169... | 4/25/2017 5:34 PM |
| 170425-SY-SYP_174... | 4/25/2017 5:38 PM |
| 170425-SY-SYP_167... | 4/25/2017 5:28 PM |
| 170425-SY-SYP_166... | 4/25/2017 5:28 PM |
| 170425-SY-SYP_157... | 4/25/2017 5:24 PM |
| 170425-SY-SYP_155... | 4/25/2017 5:23 PM |
| 170425-SY-SYP_149... | 4/25/2017 5:21 PM |
| 170425-SY-SYP_145... | 4/25/2017 5:16 PM |
| 170425-SY-SYP_135... | 4/25/2017 5:12 PM |
| 170425-SY-SYP_138... | 4/25/2017 5:10 PM |
| 170425-SY-SYP_126... | 4/25/2017 5:09 PM |
| 170425-SY-SYP_125... | 4/25/2017 5:08 PM |
| 170425-SY-SYP_123... | 4/25/2017 5:08 PM |
| 170425-SY-SYP_121... | 4/25/2017 5:07 PM |

New Venture Competition 2017

Search returned 2500 records (of 15498 hits); Sorted by recently input first

### 3. ICON GUIDE

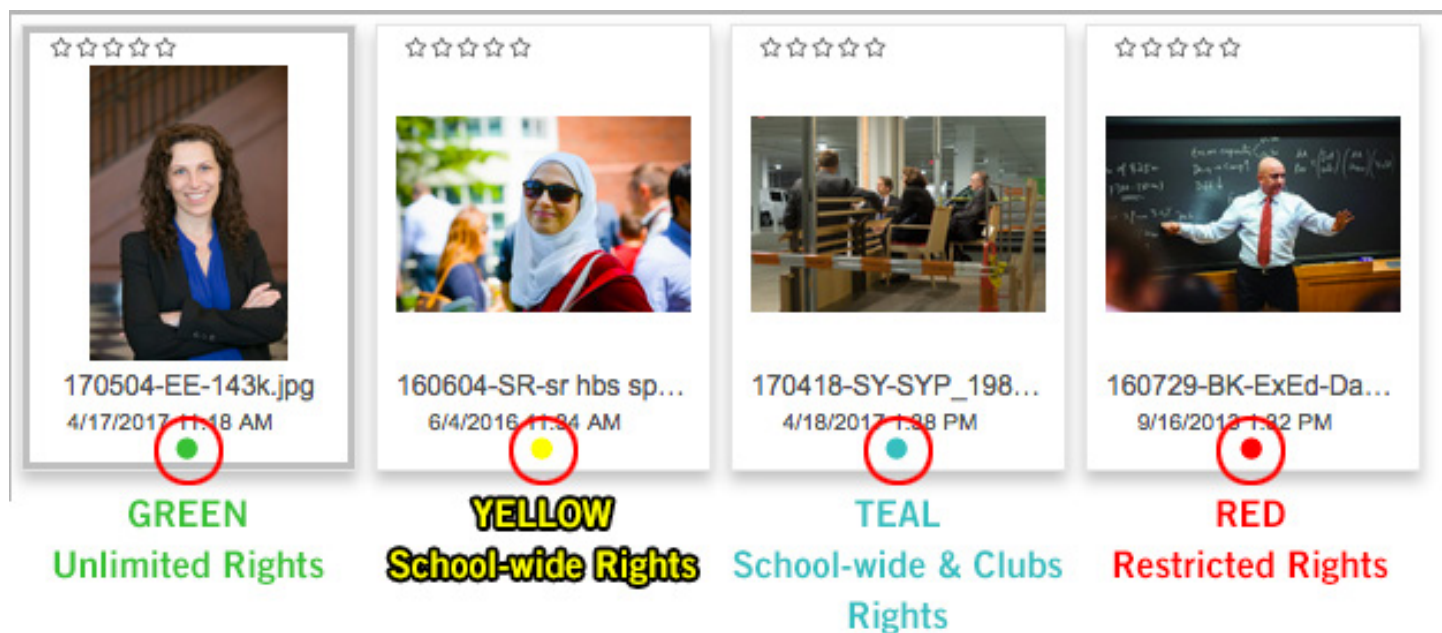
Look for these icons in the sections below.



### 4. COLOR CODE GUIDE

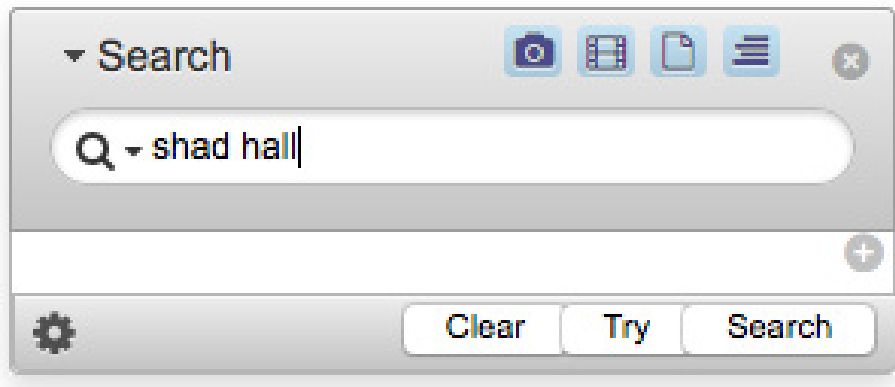
Color codes are being used as a quick visual reference for the usage rights attached to a photo.

They are as follows:



# SEARCHING & VIEWING

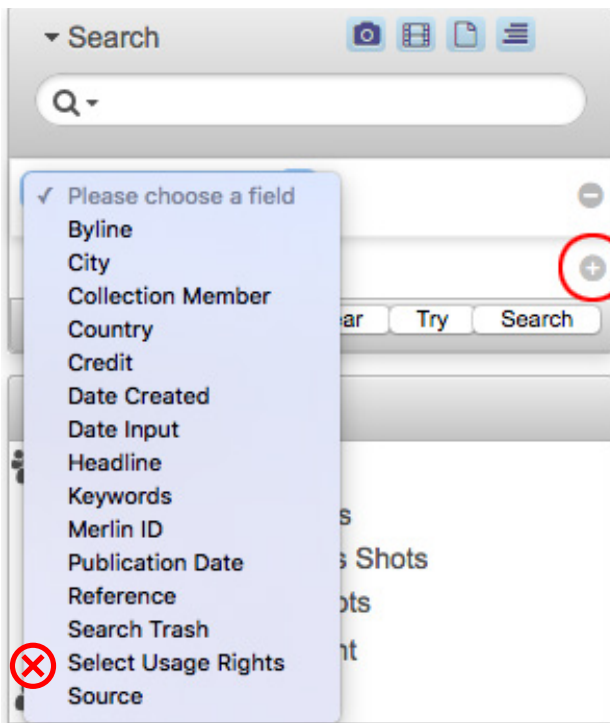
## 1. TEXT SEARCH



**Plain text search** will search all keywords, photographers, Merlin IDs, captions, and filenames.

This will probably suffice for most searches.

## 2. ADVANCED SEARCH



Use the **“Please choose a field”** dropdown to search a specific field. Click the **plus button** on the side to add another field to your search.

The relevant fields are:

Byline: *photographer*

City: *(in which the photo was taken)*

Country: *(in which the photo was taken)*

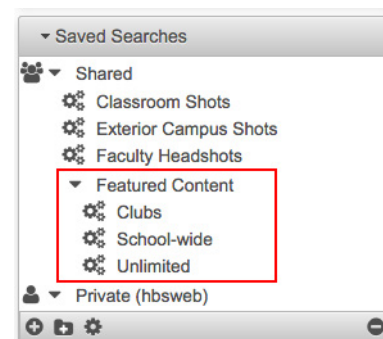
Date Created: *date photo taken*

Date Input: *date photo was uploaded*

Headline: *persons featured in photos (where applicable)*

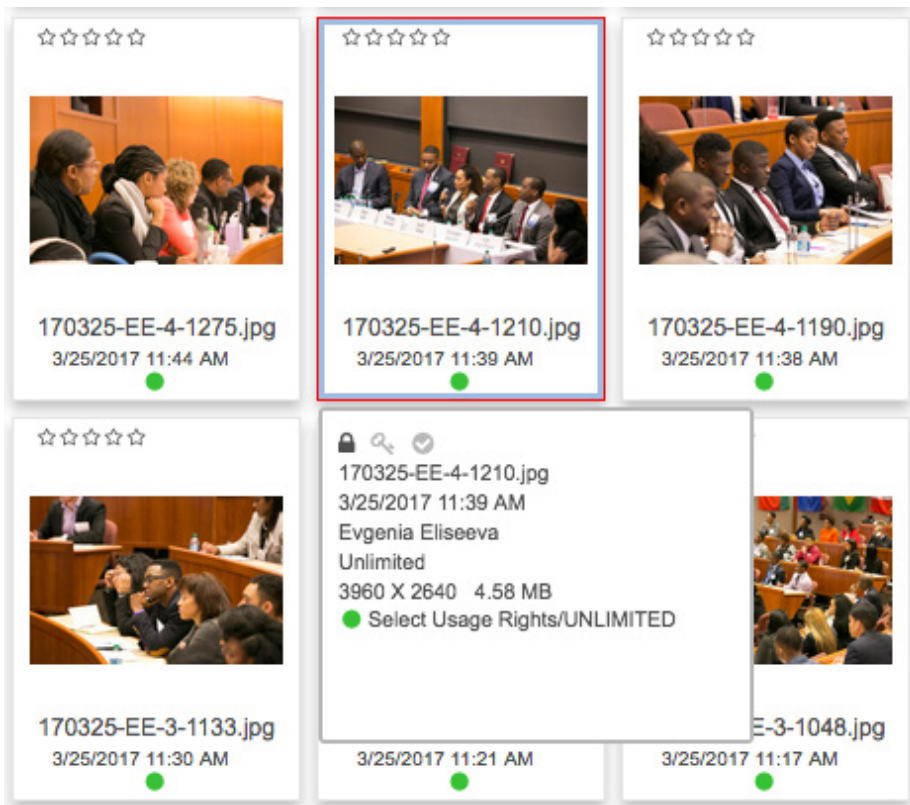
Reference: *department that uploaded the photo*

❌ Select Usage Rights: *Instead of using this filter, use the saved searches under “Featured Content” in the Saved Searches module.*





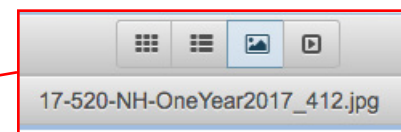
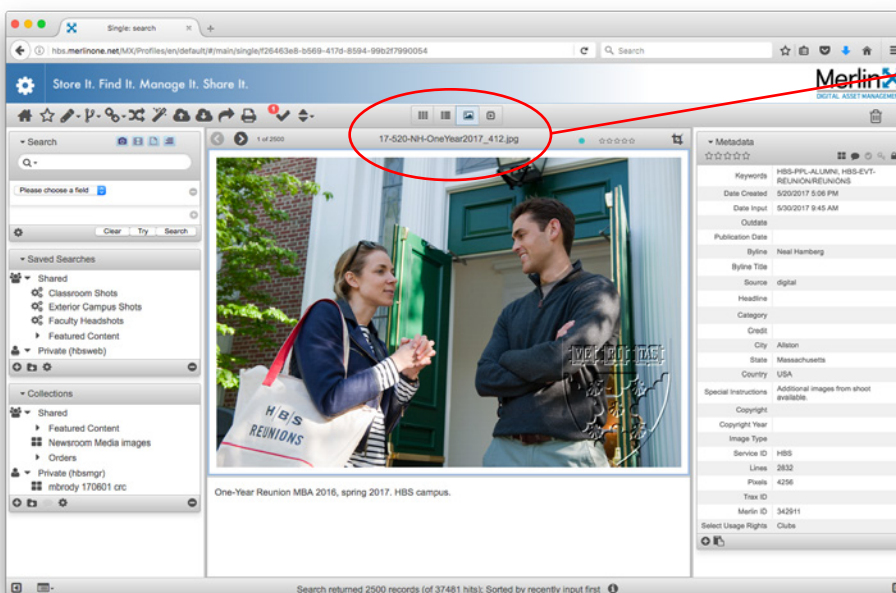
### 3. SELECTING



Hover over photo or click photo to see metadata preview below the image.

Double click to view in single image viewer, or use the single viewer button in the icon bar (see icon guide on page 4).

### 4. SINGLE IMAGE VIEW & FINDING FILE NAME



Full and selectable filename can be found in **single image view**, above the photo.

To return to your search, click the **grid view button** (see icon guide on page 4).

# SELECTING

## 1. SELECTING



Number near check mark in icon bar shows how many photos are selected.



Click check mark to select all photos in search or in collection.

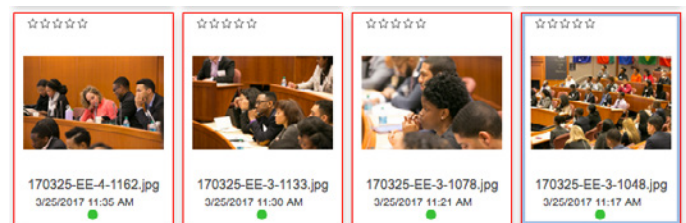


Click check mark again to deselect all photos. This will NOT save your earlier selection.

## 2. SELECTING MULTIPLE PHOTOS

Select multiple photos using the **Ctrl** key on a PC, **Cmd** key on a Mac.

To select consecutive photos, you can also use the **Shift** key.



## 4. COMPARE PHOTOS




Left: Compare icon.

Select multiple photos (see page 7) and press the **compare button** to view in compare mode, below.


Compare

☆☆☆☆☆




170325-EE-3-11...  
3/25/2017

☆☆☆☆☆



170325-EE-3-10...  
3/25/2017


☆☆☆☆☆




170325-EE-3-10...  
3/25/2017

1 of 3

2 of 3



☆☆☆☆☆



☆☆☆☆☆



# EXPORTING & ORDERING

To begin, select any photo(s) you would like to share or order (see page 7).

## 1. EMAILING A CONTACT SHEET



After selecting photo(s), **click the share icon** (see icon guide on page 4).

Email a collection or multiple selected photos as a contact sheet by **selecting Email Previews**.

Share

Email Previews

An email with a link to a static grid view will be emailed to the address(es) below. Default email subject and the grid description can be edited.

Email To (separate with commas):  
johndoe@hbs.edu

Email CC (separate with commas):

Email ReplyTo (optional):  
mbrody@hbs.edu

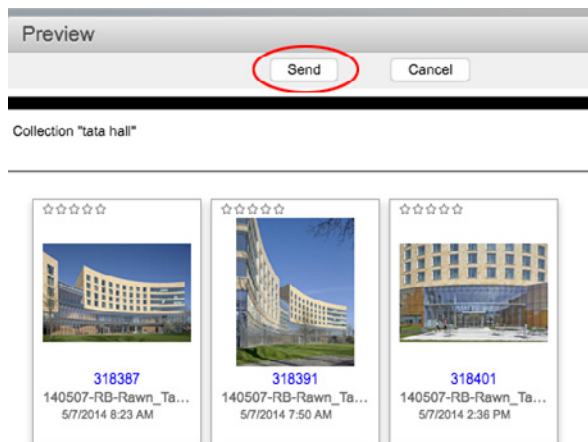
Email Subject:  
Tata Hall photos

Description:  
Collection "tata hall"

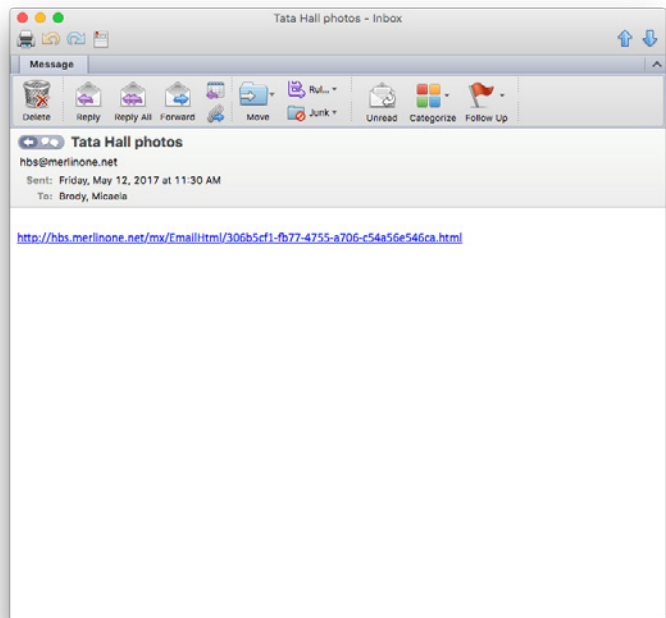
Email Text (The automatically-generated url link may be positioned by entering "\$\$insertUri\$\$", otherwise it will be added at the end of the text provided.):

Generate Preview

View preview of contact sheet & **send**:



Recipient will receive link to contact sheet.



## 2. ORDERING PHOTOS



After selecting photo(s), **click the order form icon** (see *icon guide on page 3*).

Fill out the form that pops up. **Name, Email, and Delivery Request** are required fields.

Delivery Request is set to **Standard (1–2 days)** by default.

Please restrict **Urgent** orders to under 5 photos. Select **Low Priority** if you are able to wait 3–7 days for your request.

Order Form

Please confirm you have the appropriate usage rights prior to ordering your photos to avoid delays.

Four files

\* Name

\* Email

Address

Phone

Delivery Email

Billing Code

Delivery Request

☒ Standard (1-2 business days)

☐ Low Priority (3-7 business days)

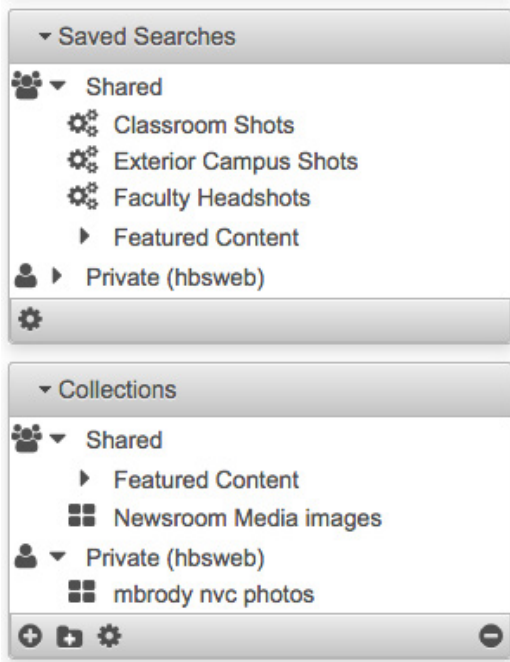
☐ Urgent (please restrict to under 5 photos)

For immediate assistance, please email Micaela Brody (mbrody@hbs.edu)

Comments

Submit Order

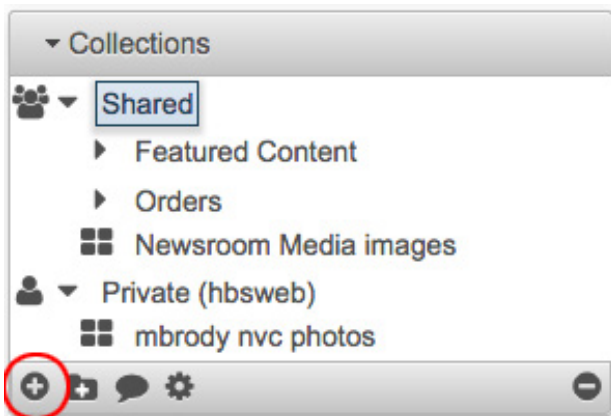
# COLLECTIONS & SAVED SEARCHES



Saved Searches and Collections modules can be found in the **left sidebar**.

## 1. CREATING COLLECTIONS

Select either **Shared** or **Private** to create new collection in that folder. **Press the + icon**.



**Name collection** with the following naming convention:

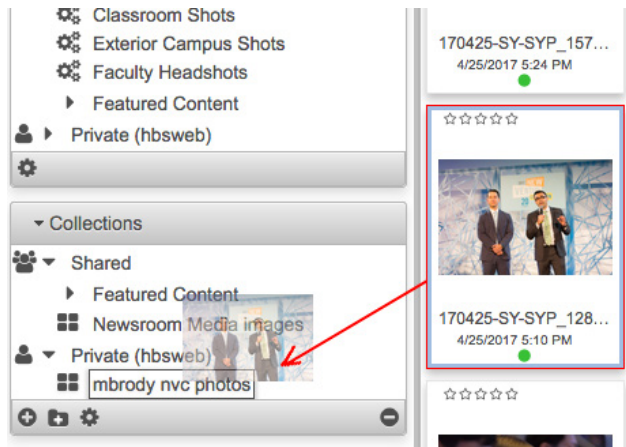
[username/last name/organization] [subject]



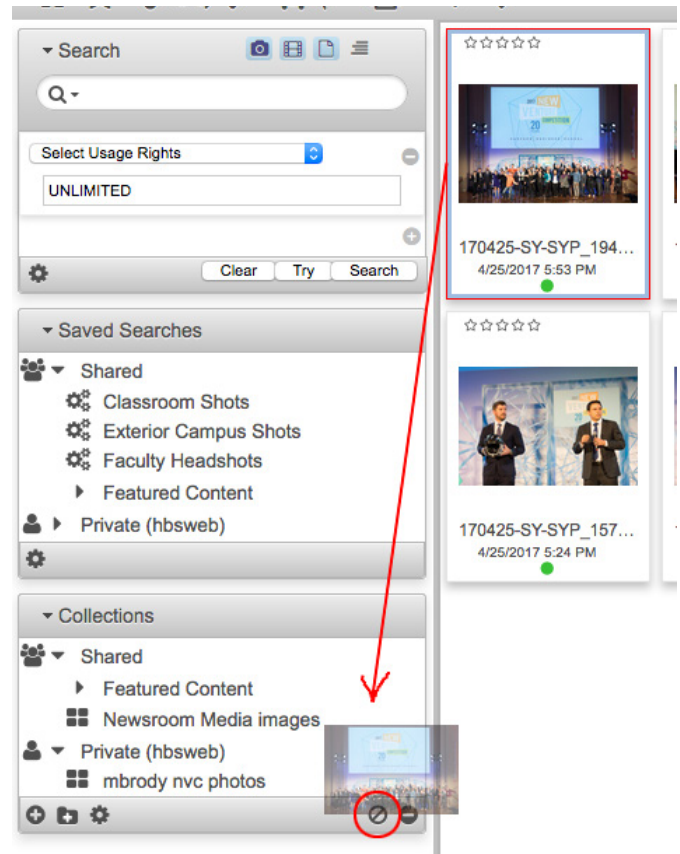
**Double click name of collection** to view.

## 2. ADDING TO & EDITING COLLECTIONS

Select the photos you would like in your collection (see page 7). **Drag and drop photos** into the collection:

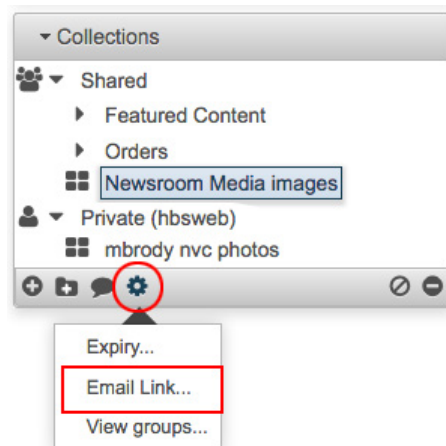


Remove items by dragging them to the **small cancel button** in the collections module.



## 3. SHARING COLLECTIONS

Shared collections can be sent via email to other users by using the **email link button** under the gear menu:



Email Link for Collection "Newsroom Media images"

Note, the url sent will require the user to be able to log in.  
In order to be able to open this collection, they will need to have access permission to it.  
The url can also be copied from this form and used separately.

Url to send: <http://hbs.merlinone.net/mx/?path=%2Fcollection%2F200000130>

Email To (separate with commas):

Email CC (separate with commas):

Email ReplyTo (optional):

Email Subject:

Email Text (use \$\$insertUrl\$\$ to indicate where the url should be inserted, otherwise will be automatically added at the end of the text provided):

Here's a collection of the images found at <http://www.hbs.edu/news/Pages/for-the-media.aspx>