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MerLin 4.0 User Guide

Making the Most of the MerLin Intranet

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Table of Contents

TABLE OF CONTENTS.....	2
ABOUT THIS DOCUMENT.....	3
CHANGE LOG.....	3
USING MERLIN 4.0.....	4
HOW TO USE THE NEW OR UPDATED FEATURES.....	4
Logging into MerLin 4.0.....	4
MerLin’s Home Page Design.....	5
What tools migrated from the old version?.....	6
Editing Your Department’s Home Page.....	6
Creating Hyper-Links to Documentation.....	9
Creating Hyperlinks to Other MerLin Pages.....	10
Assigning Page Edit Rights to Other Users.....	11
Creating New Sections on a Page.....	11
Creating New Department Sub Pages.....	12
The Documentation Management System.....	14
Finding Published Documentation.....	14
Search Engine.....	14
DMS Documents by Type.....	14
My Workspace.....	15
Uploading a New, Unpublished Document.....	15
Checking Out a Document for Editing.....	17
Checking Out Documents Found with the Search Engine.....	18
Checking Edited Documents Back In.....	18

About This Document Change Log

The following table lists all major changes made to this document. The last entry is the date on which the document was released. Entries give the date the document was updated, the initials of the person updating the document, and a brief description of the change.

Correction of typographical errors and minor or non-substantive changes to the document are not noted in the change log table.

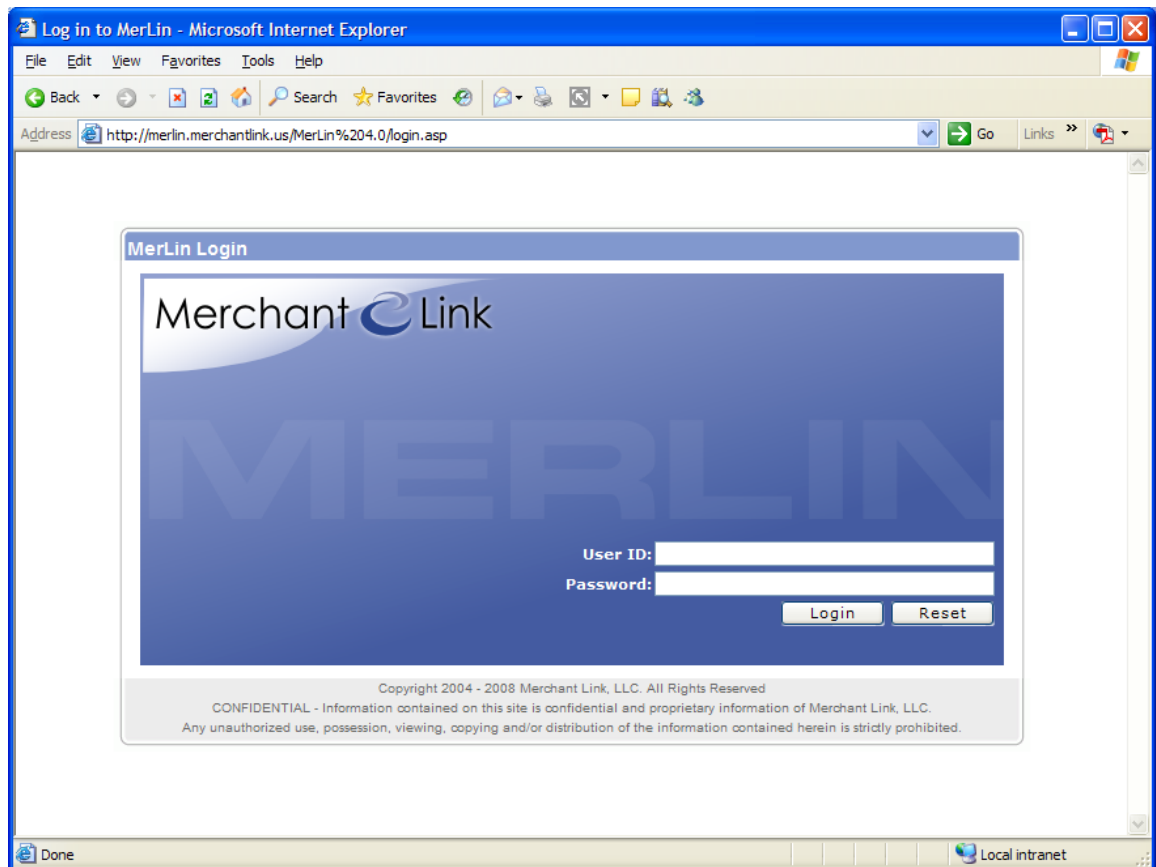
DATE	INITIALS	BRIEF DESCRIPTION OF CHANGE
30-OCT-2008	CPC	Base document created.
06-NOV-2008	CPC	Completed a number of grammatical edits for clarity after editorial direction. Updated several screenshots to current views.

Using MerLin 4.0

How to Use the New or Updated Features

Logging into MerLin 4.0

1. Navigate to MerLin 4.0 by opening <http://merlin.merchantlink.us/MerLin 4.0/> in your browser. A login page like the one below displays:



2. Enter your 5 digit Chase Paymentech employee ID number in the **User ID** field.
3. Enter the default password **merlin4.0** in the password field (The password is case sensitive and the period is required when using the default password).
4. A prompt displays asking you to enter a new password.
5. Enter the default password again in the **Old Password** field.
6. Enter the new password.

Password Tips

- △ Over 7 characters in length

- △ Must contain letters and numbers
 - △ Must not contain punctuation (The default password for new logins is the only exception allowed)
 - △ Passwords are forced to reset every 90 days by the system.
7. Enter your new password again in the **Confirm New Password** field.
 8. Select **Commit Change** to save.

MerLin's Home Page Design

After logging into MerLin, a home page like the one below displays:

To the left are navigation options, the Open Communication panel, the ML Extensions search tool, and calendar.

At the top are icons to directly access MerLin Change Request, Office Access Car Request, Phone Lists, Commcenter, On Call Agent Calendar, and EM7. Hover your mouse over the icons for a tool tip to that identifies it.

What tools migrated from the old version?

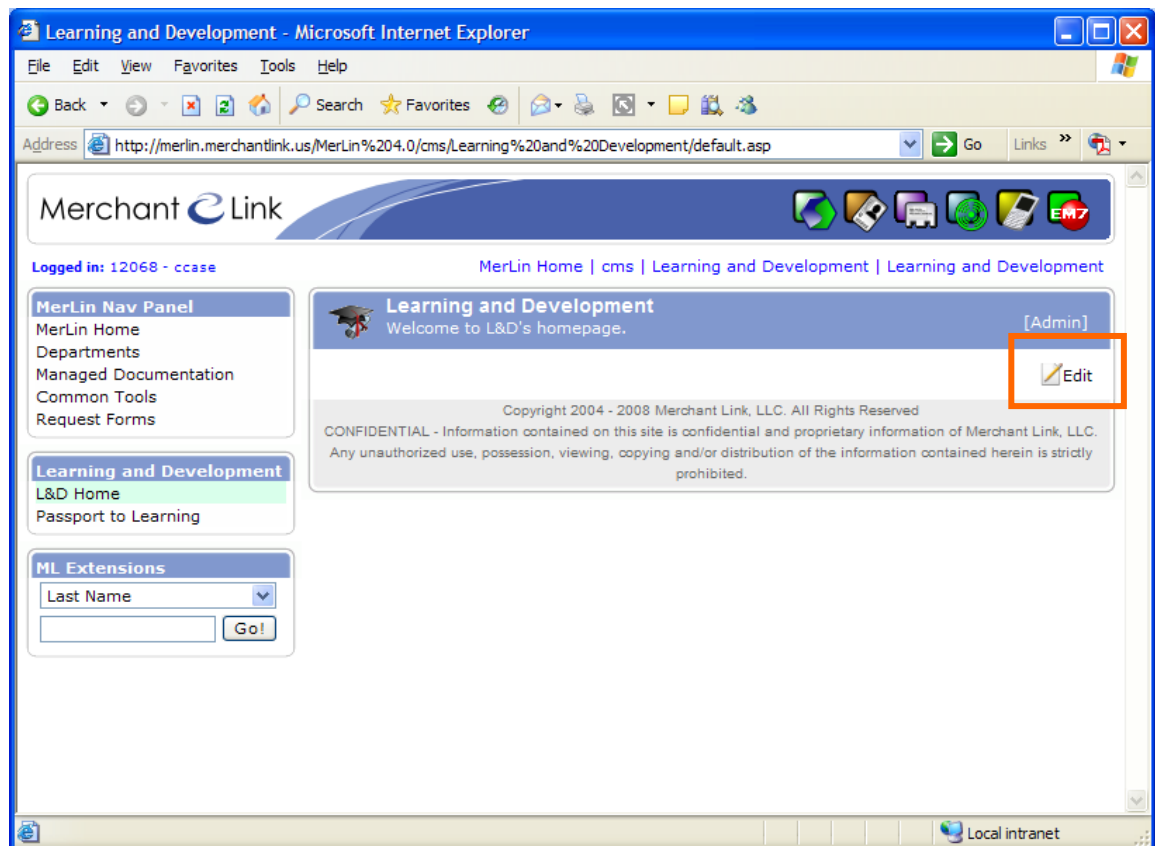
The following tools migrated from version 3.3. Any changes from the previous version are noted below.

- △ Accessed from the icon at the top of every page
 - Passport to Learning**
 - MerLin Change Request**
 - Office Access Card Request Tool**
 - MerLin Communications Center**
 - On Call Agent Calendar**
- △ Accessed from the **Open Communications** panel
 - Thinking Upstream**
 - Suggestion Box**
- △ Located in the NOC page
 - NOC Event / Task Check List**
 - NOC Outage Notification Tool**

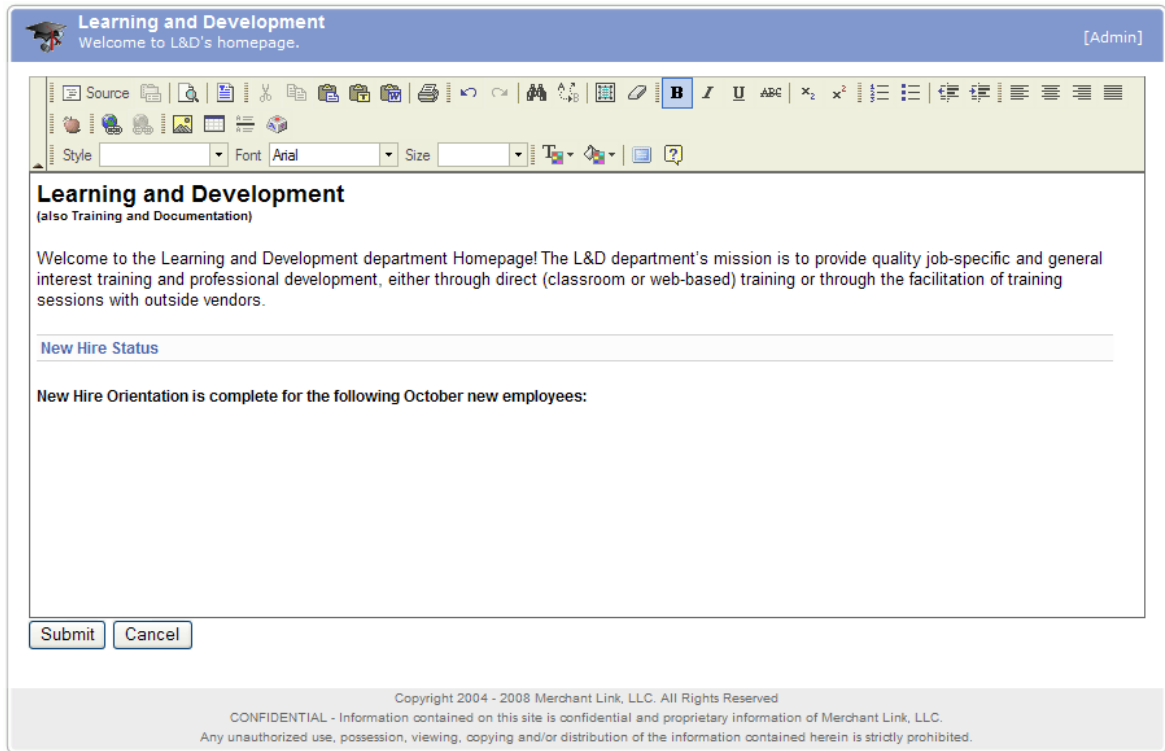
Editing Your Department's Home Page

MerLin 4.0 allows permitted users to edit their own department's content. The Content Management System editor (CMS editor) allows you to edit your page from within your web browser.

If you have edit rights to your department's pages, an edit button displays in the lower right corner of all sections on the page.










1. To access the editor select **Edit**. The cms editor displays:



2. Make any applicable changes within the editing tool.
3. Select **Submit** to save the changes or **Cancel** to exit without saving. Changes are real-time and overwrite any previous content.

The following is a guide of the most commonly used buttons available to you in the editor and the functionality they provide:

TOOLBAR ELEMENT	FUNCTION
	Preview what the HTML page looks like for users.
	Select a layout template. (Great for first-time users)
	Cut the highlighted text to the clipboard.
	Copy the highlighted text to the clipboard.
	Paste the data copied to the clipboard (with or without formatting).
	Paste content copied from Microsoft Word or similar applications.
	Print the current section.
	Undo or redo the most recent action taken.
	Select the entire text in the section.
	Remove the formatting from the highlighted text.
	Applies bold, italic, underscore or strikethrough formatting to the highlighted text.
	Creates numbered or bulleted lists.
	Increase or decrease the text indentation.
	Sets the text alignment (left, centered, right or justified).
	Avalon Link. Presents a dialog to create hyperlinks to managed documentation.

	Converts or removes the text in hyperlinks. It may also be used to manage file uploads and links to files on the web server.
	Inserts images into the section.
	Creates a table with the defined number of columns and rows.
	Inserts a divider line (horizontal rule).
<div style="border: 1px solid gray; padding: 2px;"> <div style="border-bottom: 1px solid gray; padding: 2px;">Style ▼</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Format ▼</div> <div style="border-bottom: 1px solid gray; padding: 2px;">Font ▼</div> <div style="padding: 2px;">Size ▼</div> </div>	Styles & formatting determine the appearance and semantic value of your document. You may use the drop down boxes to apply styles, set the font, its size, etc. To remove the applied style, select the style name again.
	Changes the color of the text.
	Changes the background color of the text.
	Maximizes the editor size inside the browser.

NOTE:

It is best to compose your content before applying any styles from the “Style” dropdown. HTML-based editors have behaviors that are not seen in WordPad or Word that may be confusing. If you make any mistakes, you can click on the cancel button to exit the editor without saving.

4. Once submitted, note the newly created section on your department’s home page.

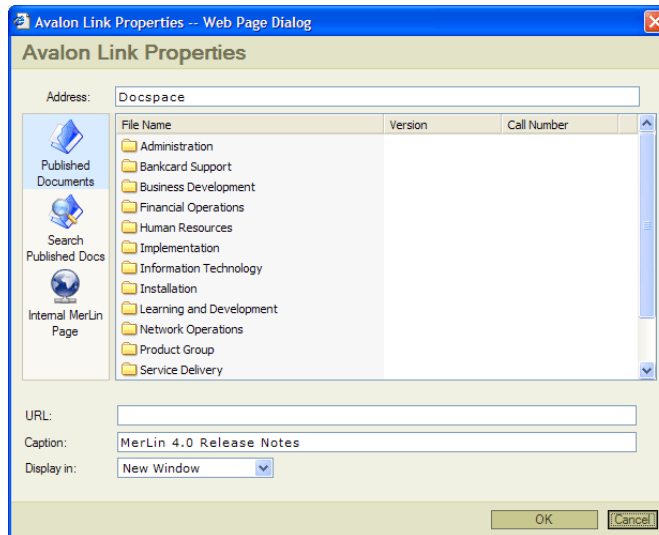
5.

Creating Hyper-Links to Documentation

MerLin 4.0 includes a new document management system (DMS) that is discussed in more detail later in this guide.

To create links to documents uploaded to MerLin's DMS on your department page, follow the steps below:

1. Place your cursor in the location you want to create the link, or highlight the text to insert the link.
2. Select the **Avalon Link** button in the cms editor. 🍌
3. The Avalon Link Properties window displays:



There are two ways to find stored documentation. The icons displayed to the left are:

- △ **Published Documents** – This is a “folder view” interface. Double-click on the folder names to open that department’s folder. Navigate into folders to locate the desired document.
- △ **Search Published Docs** – This view displays a search tool at the top of the dialog window. The following search types are provided in the drop down menu:
 - △ **Search by keyword** – Searches the actual contents of documents in the system. This is also known as a “free text” search.
 - △ **Search by call number** – Searches all managed documentation by the unique call number assigned to the document.
 - △ **Search by owner** – Search for documentation using the first or last name of the document owner. (This is not necessarily the document author.)
 - △ **Search by department** – Searches for documents owned by a particular department.
 - △ **Search by doc title** – Search for the title of the document.

4. Once you locate the desired document, select the file and the URL field populates.
5. If you did not select text in the editor before opening this dialog, enter a **Caption** for the link. If one is not entered, the hyperlink does not create in the editor.
6. Select whether the document is to display in a new window, or if it is to replace the MerLin page with the document.
7. Select **OK** to create the link.


The newly created hyper-link displays.

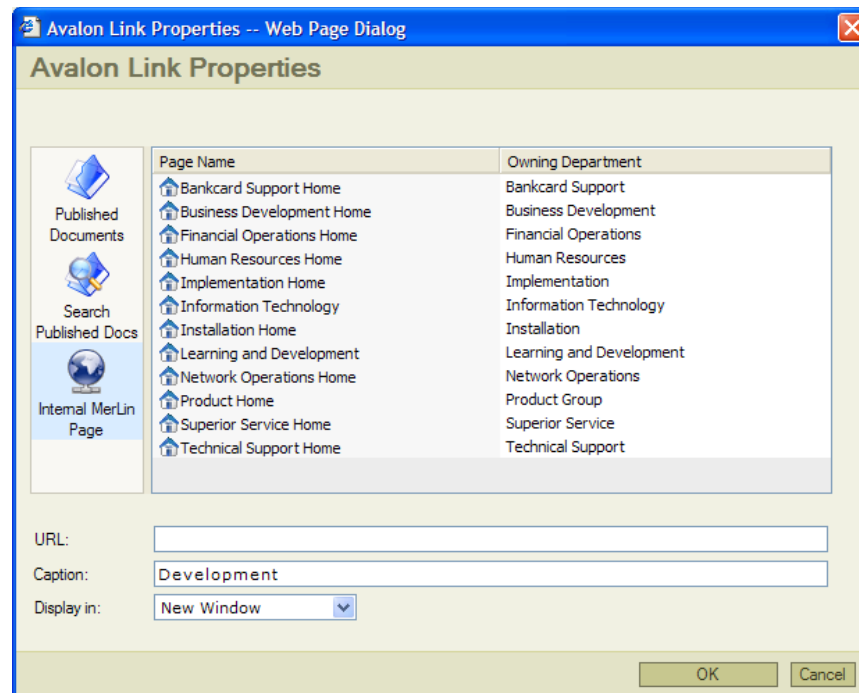
Note:

If you are unsure that the document link in the display is the correct one, you can preview it by pressing the preview button  to the far right of the entry. A new window opens with the document loaded inside.

Creating Hyperlinks to Other MerLin Pages

MerLin 4.0 now provides a simpler way to link to other MerLin pages to your page. This capability is almost identical to creating a hyperlink to a managed document. To create a link to another MerLin page, follow the steps below:

1. Place your cursor in the location you want to create the link, or highlight the text to insert the link.
2. Select the **Avalon Link** button in the cms editor. 
3. Select the **Internal MerLin Page** icon from the toolbar at the left.
4. The following list displays:



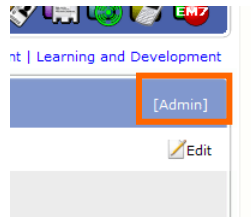
5. Select the desired page from the list.
(At present, all pages created with the content management system tools displays. In the event two or more departments create pages with similar names, refer to the second column to identify the department that owns the web page.)

6. Enter a caption for the link if you did not select text first.
7. Select the window to display the document in.
8. Select "OK" to create the link.
9. The newly created hyperlink to another MerLin page displays.

Assigning Page Edit Rights to Other Users

Department heads now have edit rights to their department homepages, or any sub pages assigned by either the department head or a MerLin administrator. To add a user as an editor of the page:

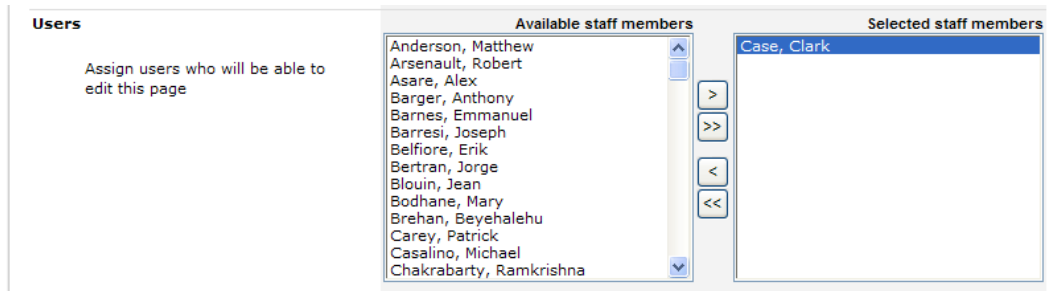
1. Select the **[Admin]** entry on the content panel's header to the right of the page header.



2. Choose the **Administer this page** from the available options.



The Administration Mode displays to assign users editing rights.



3. Select the users from the lists and press the arrow buttons to add or remove permitted page editors. Once you are satisfied with the changes, Select **Submit Changes**. The page reloads. Choose to **Exit Admin Mode** when you are finished.

Creating New Sections on a Page

You can create independent sections on a page. Each section will have it's own edit tool. You can even change the order that each section is displayed.

1. Select **[Admin]** from the content panel header to the right of the page.
2. **Administer this page** from the available options.
3. In the **Sections** box select **Add Section**.
4. Enter the name of the new section in the text field that appears.
5. Select **Save**.

Sections

Define sections present on this page including the position of display.

Quarterly Calendars	Up Down
Course Registrations	
Detailed Agendas	Save Cancel

6. The section is created instantly. If you have multiple sections, to change the display order select the section in the list, and press either the **Up** or **Down** buttons as appropriate.
7. To delete a section, select the section name, and press **Delete Section**. A warning displays to confirm the action.

Creating New Department Sub Pages

With sufficient permissions, you can create new sub pages for your department’s site. To create new subpages for your department:

1. Select **[Admin]** on the content panel’s header. (Appears in the upper-right portion of the page.)
2. Choose to **Administer My Department Page(s)** from the available options.
3. The page administration panel displays:

Department Page Administration
Create new, or delete existing department pages

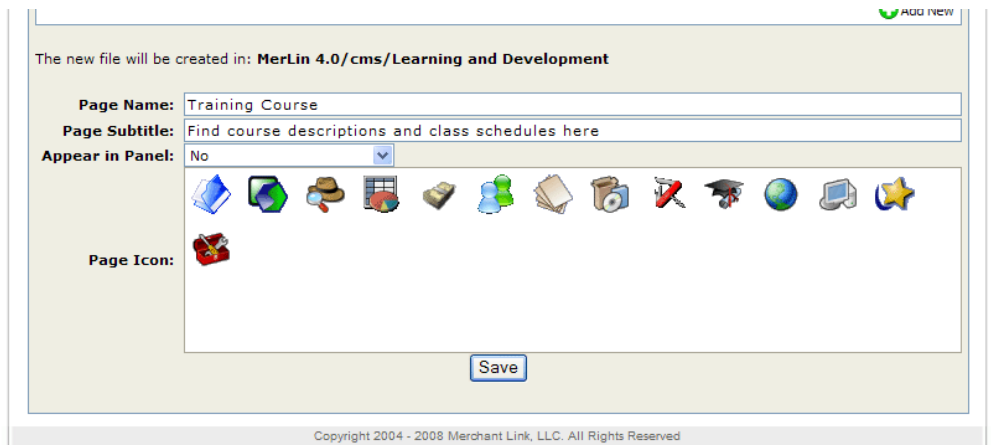
Learning and Development Page Administration

File Name	Page Title	Date Modified
default.asp	Learning and Development	10/23/2008 1:29:14 PM

+ Add New

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4. To create a new subpage, choose **Add New** from the bottom-right of the panel.
5. Enter the **Page Name** in the field provided. This is displayed in the header of the page.
6. Enter the **Page Subtitle** for the new page as a very brief description of the page.



7. Select whether the new page should display in the department’s navigational panel. Entries are shown in alphabetical order of the department navigation panel. Selecting **No** creates a free, unlinked web page. This page will need to be hyperlinked from other pages
8. Clicking on the page icon displays all available page icons. Select an Icon that best represents the subject of the page.
9. Select **Save** to create your new subpage.

A new entry displays in your page administration window as seen below.

Learning and Development Page Administration			
File Name	Page Title	Date Modified	
default.asp	Learning and Development	10/23/2008 1:29:14 PM	
training course.asp	Training Course	11/3/2008 2:05:39 PM	

10. To delete any pages select the trash bin icon to the far right. A warning dialog displays to confirm the action before the page actually deletes.

The creator of the page is automatically assigned edit rights to the page. No other staff members are added. The page creator must add users with editing permissions to have edit rights on this new page.

To exit page administration, navigate to a new page using the navigation panels to the left.

NOTE:

All hyperlinks in MerLin that point to a page deleted with this tool will be broken. There are no tools in place to identify pages that are linked to ones you delete. Caution should be observed before deleting pages that might be linked in other locations.

The Documentation Management System

MerLin 4.0 introduces an entirely new way of handling documentation as well as linking to them. Documents are uploaded to MerLin when they are initially published. A unique call number and revision number is assigned to the document. This ensures that we have only one “official” or published version of a document and that it is always located in the same place. Draft copies of documents are not to be uploaded to MerLin

After the initial upload, documents must be checked out to make changes to them. Once complete the document is uploaded back into the system or “Checked In”

Finding Published Documentation

There are three ways to find documents:

Search Engine

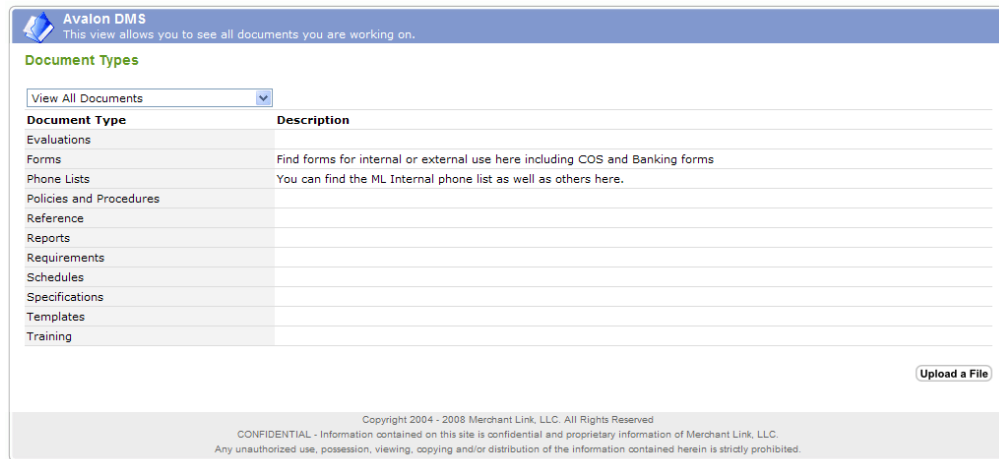
MerLin 4.0 includes a document search engine. The following search types are available

- △ **Search by keyword** - Locate documents searching the contents of documents. This is also known as a “free text” search.
- △ **Search by call number** - Locate documents by their unique call number.
- △ **Search by owner** - Locate documentation using the first or last name of the document owner. (This is not necessarily the document author.)
- △ **Search by department** - Locate documents matching the owning department.
- △ **Search by doc title** - Locate documents where the title contains the search words or phrase. (This is not the file name but the title property located in the document’s summary data. This field is accessed in Office documents by clicking on “File”, then “Properties” on the menu. The Title property is located under the “Summary” tab. If the document does not have this populated properly, it will not be found.

DMS Documents by Type

Documents are assigned a type when they are uploaded. To search for documents by type:

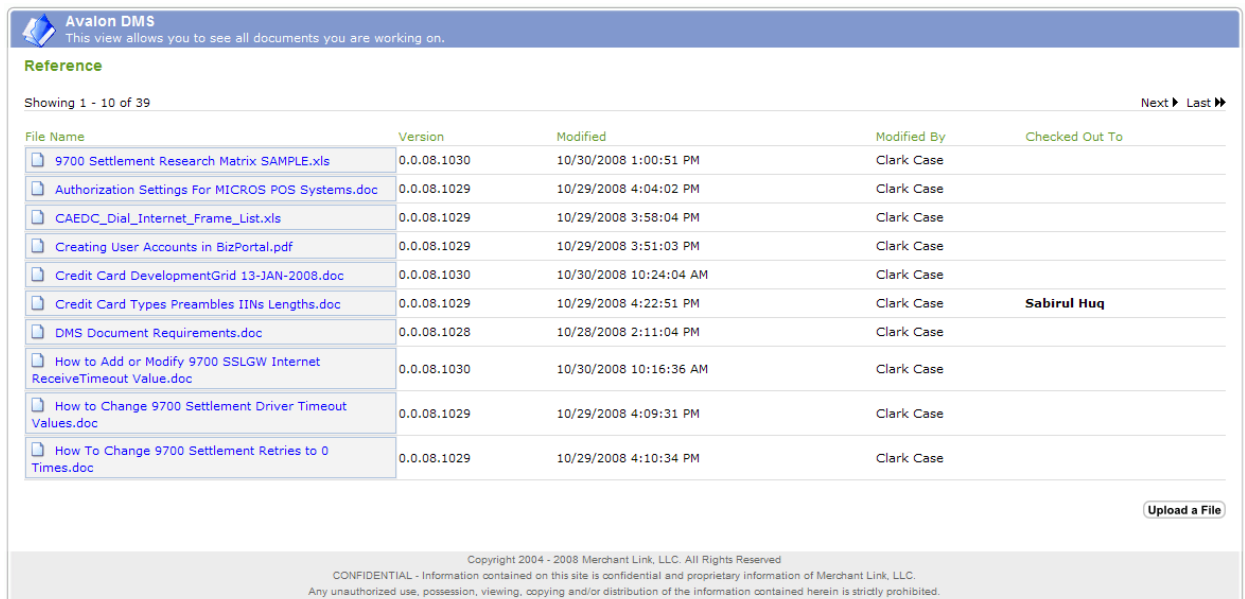
1. Select **DMS Documents by type** from the DMS Panel on the left. The following list displays:



This view has a filter at the top. The drop down lets you refine your results using the following options:

- △ View All Documents (default)
- △ View by Department
- △ View by Owner

Select the desired document type. The filter will narrow your results. The results page displays matching documents alphabetically with 10 per page. A tool displays in the upper right-hand corner to navigate through the results. The total number of documents is displayed to the upper-left of the list.



My Workspace

This view displays documentation in a several ways. Change views with the drop down menu displayed in the upper right-hand corner:

- △ **Documents Pending Review** (Documents you own that have reached the review date.)
- △ **Documents I have Checked Out**

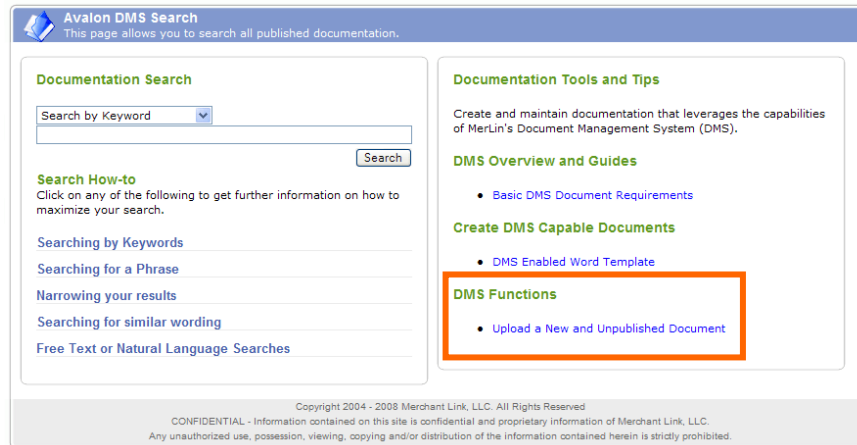
△ **Documents I Own or Maintain**

△ **Documents From My Department**

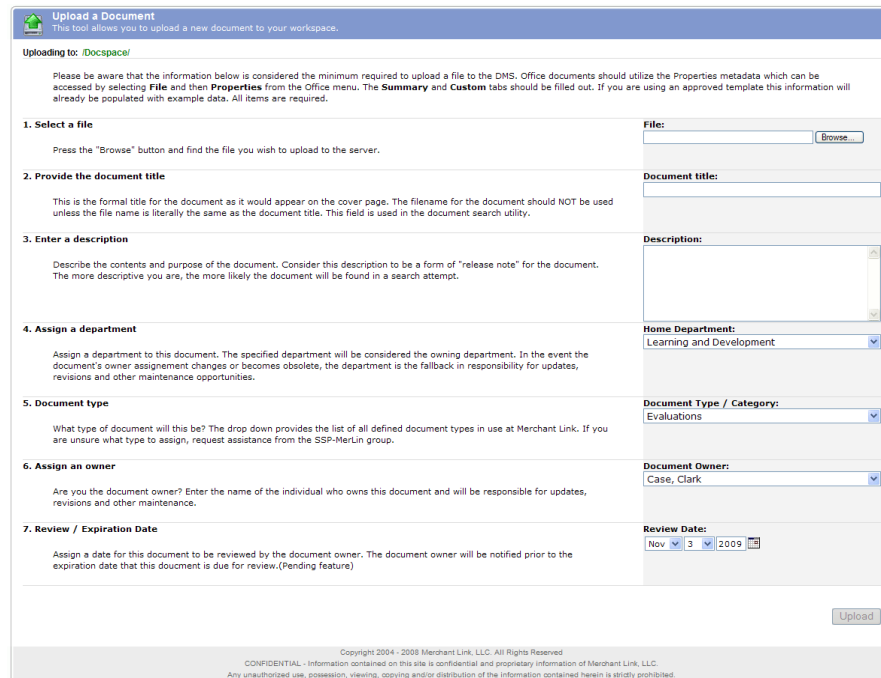
All documents are displayed in alphabetical order.

Uploading a New, Unpublished Document

1. Select **Managed Documentation** from the navigational panel on the left.
2. Select **Upload an New and Unpublished Document** under the **DMS Functions** section



3. The upload submission form displays.



4. Press the **Browse** button.
5. Find the local file on your system using the dialog window and press **Open**.
6. Enter the **Title** of the document.
7. Provide a **Description** for the document.
8. Assign the **Department** that owns or maintains the document.

9. Assign the **Document Owner**. (If there isn't a current owner then the document should be assigned to the department head).
10. Choose **Review Date**.
11. Press the **Upload** button to upload the document.

After the upload completes the properties page displays:

Documentation Details

This view allows you to see properties of the selected document.

Document Details

File Name:	Avalon Enabled Template.doc (Click to View)
Title:	Avalon Enabled Template
Version:	0.0.08.1031
Description:	This document was designed to compliment the new Document Managemnt System (DMS) tools developed under project Avalon. It contains a VBA Macro to update a number of fields that are tied to the document properties as well as custom document properties that Avalon leverages for management.
Owning Department:	Learning and Development
Document Owner:	Clark Case
Initial Upload:	Published by ccase on 10/23/2008 2:22:24 PM
Last modified:	Modified by jstier on 10/31/2008 4:00:14 PM
Next Review Date:	10/31/2009
Status:	Active
Checked Out To:	[Check Document Out]
Call Number:	DMS-TMP-1000

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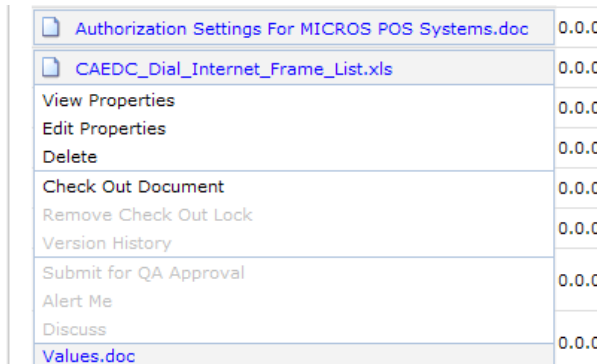
NOTE:

This method is strictly for uploading documentation that does not already exist. To upload a new revision of a published document, it should be checked out of the system first. Document revisions are checked back into the DMS system, not uploaded as previously described.

Checking Out a Document for Editing

To check out a document for editing:


1. Select **Managed Documentation** from the navigation panel on the left.
2. Locate the document by type, from your **My Workspace** page, or by using the search engine.
3. Once located, click on the file name to drop down the menu:



4. Select **Check Out Document**.
5. Select **Save** from the file download dialog.
6. The document is immediately stamped as checked out.

Checking Out Documents Found with the Search Engine

Files returned in the search attempt will have a hyper-linked title. This link only allows you to open the file for viewing. To check out the file, click on the icon to the right of the title:

- 
CAEDC Dial Internet Frame List
(DMS-REF-1005) Purpose Change History TEST BOX PROCESSOR:
 The 1-800-886-1755 (TNS) number should only be used for sites wit
 numbers since the TNS numbers do not have the DNIS (Dialed Num
/docspace/service_delivery/reference/caedc_dial_internet_frame_lis

The file's properties page displays. Click on **[Check Document Out]** to download the file and automatically tag it as checked out.

Documentation Details

This view allows you to see properties of the selected document.


Document Details

File Name:	CAEDC_Dial_Internet_Frame_List.xls (Click to View)
Title:	CA/EDC Dial/Internet/Frame (Complete Reference Doc)
Version:	0.0.08.1029
Description:	CA/EDC Dial/Internet/Frame (Complete Reference Doc)
Owning Department:	Service Delivery
Document Owner:	Sabirul Huq
Initial Upload:	Published by ccase on 10/29/2008 3:58:04 PM
Last modified:	Modified by ccase on 10/29/2008 3:58:04 PM
Next Review Date:	10/29/2009
Status:	Active
Checked Out To:	[Check Document Out]
Call Number:	DMS-REF-1005

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Checking Edited Documents Back In

1. Navigate to the document using the **Search Engine**, **DMS Documents by Type**, or **My Workspace**.
2. Select the file name to drop down the menu.
3. Choose **Check Document In** from the list.

 CAEDC_Dial_Internet_Frame_List.xls	0.0.1
View Properties	0.0.1
Edit Properties	0.0.1
Delete	0.0.1
Check Document In	0.0.1
Remove Check Out Lock	0.0.1
Version History	0.0.1
Submit for QA Approval	0.0.1
Alert Me	0.0.1
Discuss	0.0.1

The document check in form displays:

Check In a Document
This tool allows you to upload your revised document.

Document Check In: CA/EDC Dial/Internet/Frame (Complete Reference Doc)

Uploading to: /Docspace/Service Delivery/Reference

<p>1. Locate and upload your revision</p> <p>Locate the document you wish to check in to the system.</p>	<p>File:</p> <input type="text"/> <input type="button" value="Browse..."/>
<p>2. Archive or overwrite the previous document</p> <p>Specify what you want to happen to the previous version of this document. You can retain a historical copy or overwrite the version you checked out, with the version you are checking in.</p>	<p><input checked="" type="radio"/> Overwrite the previous version.</p> <p><input type="radio"/> Archive the previous version.</p>
<p>3. Version control</p> <p>The version number for this document will be incremented with the completion of this form. Specify if this was a major or minor revision, or accept the default. The criteria are as follows:</p> <p>Minor revision - Incremented for the following reasons:</p> <ol style="list-style-type: none"> 1. The document has undergone a revision and has completed a QA cycle for release. 2. Substantial changes to make corrections that can bypass a QA process are introduced at any level. This is on content and does not include changes introduced due to grammatical, typographical or layout issues. <p>Major revision - Involves changes to the following extent:</p> <ol style="list-style-type: none"> 1. A complete rewrite of the document. 2. Changes to more than 50% of the document are introduced to existing content. Changes are to the core content and not grammatical, typographical, or due to layout issues. 3. Or an increase in content that exceeds 20% of the original document 	<p>Default <input type="button" value="v"/></p> <p>The current version number is:</p> <p style="color: red; font-weight: bold;">0.0.08.1029</p> <p>After document check in, the version number will be updated to:</p> <p style="color: red; font-weight: bold;">0.0.08.1103</p>
<p>4. Review / Expiration Date</p> <p>Assign a date for this document to be reviewed by the document owner. The default is 1 year from today if unchanged.</p>	<p>Review Date:</p> <p>Nov <input type="button" value="v"/> 3 <input type="button" value="v"/> 2009 <input type="button" value="calendar"/></p>

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4. Click **Browse** to display the **Open File** dialog box
5. Locate your local edited document and press **Open**.
6. Choose to overwrite or archive the previous version of the document.
7. Select the revision type.
8. Choose the **Review Date**.
9. Press **Upload** button to commit the change.
10. The **Managed Documentation** homepage displays.

NOTE:

Document names must remain the same. If you choose a file with a different name from the dialog window, the system will alert you. You will be required to locate your local copy again.
