

# Setting up the Merlin Bird ID app on your smartphone (iphone or Android)

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## Before you begin

The Merlin Bird ID app, and affiliated Cornell Lab tech tools including eBird, are completely FREE with no add-on purchase costs.

To set up Merlin on your iPhone or Android smartphone, be where you have WiFi and have your phone fully charged.

If possible, dedicate your phone to the setup process. View these instructions alongside on a different device, or print the instructions out.

Even if you have used Merlin in the past, go through these instructions with your phone to be sure your app is up to date and that you have the Settings and Bird Packs we'll use on the field trip.

If you are new to Merlin but already have a Cornell Lab username and password (for example, from using eBird), find that information before you start the setup. It is important to use the *same* Cornell Lab account for Merlin, eBird, and any and all other Cornell Lab tech tools you use.

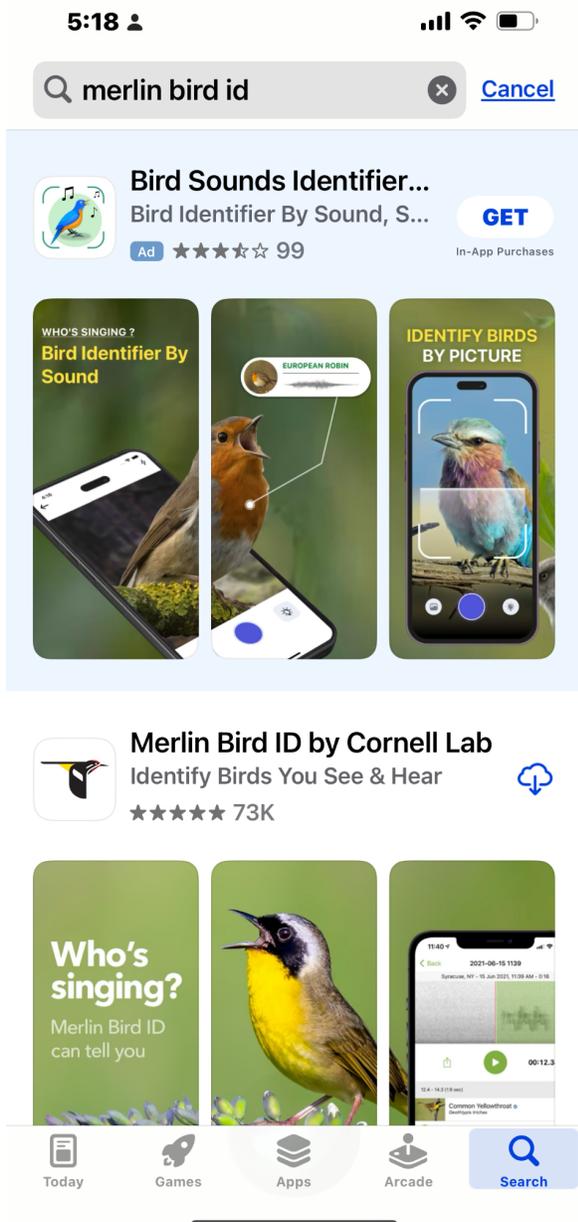
If you don't already have a Cornell username, you'll create one using the instructions below.

Read each section of instructions before diving in so you know where you're headed.

## 1. Download (or update) the Merlin Bird ID app

From your phone's home screen, tap to open the *App store* (iPhone) or *Google Play store* (Android).

Tap to *Search* and start to type in *Merlin Bird ID*. When it appears on the list, tap its name. When the apps open up, do NOT tap to select the first app listed, it's an ad. Look or slide down until you see *Merlin Bird ID by Cornell...* Its icon is a stylized black and white bird on a white background, flying from left to right. Tap to download, GET or OPEN the app, and wait a few minutes for it to download.



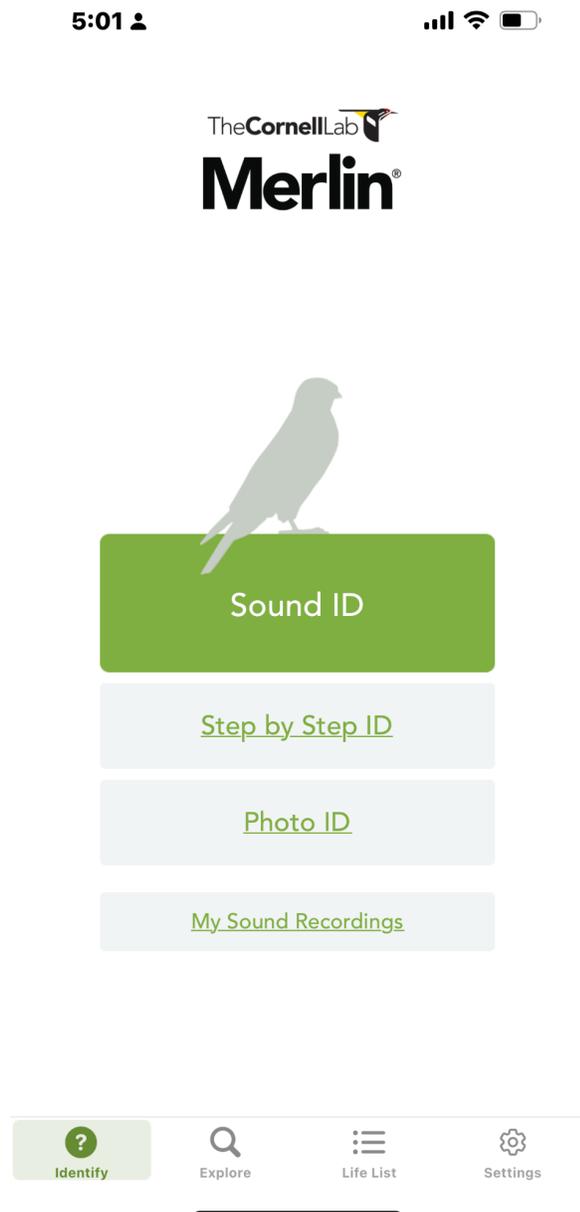
If the Merlin app was already on your phone, you'll see OPEN in the place of a *Get* or *Download* symbol. Tap OPEN, which will update your app to the latest version. There have been important changes in the past several months, you'll want to be sure you're working with the latest version of the Merlin Bird ID app.

If you're new to the Merlin app, tap to download it, then open it. You will be prompted to enter your email address. If you have never used any of the Cornell Lab tools, you may also be asked to respond to an email from Cornell to verify your email address. When you sign in to the app for the first time, you'll see a series of screens to introduce you to the Merlin app. Take your time to read and follow the instructions on each of the screens, and say YES or ALLOW to everything. This will accomplish most (or all) of the

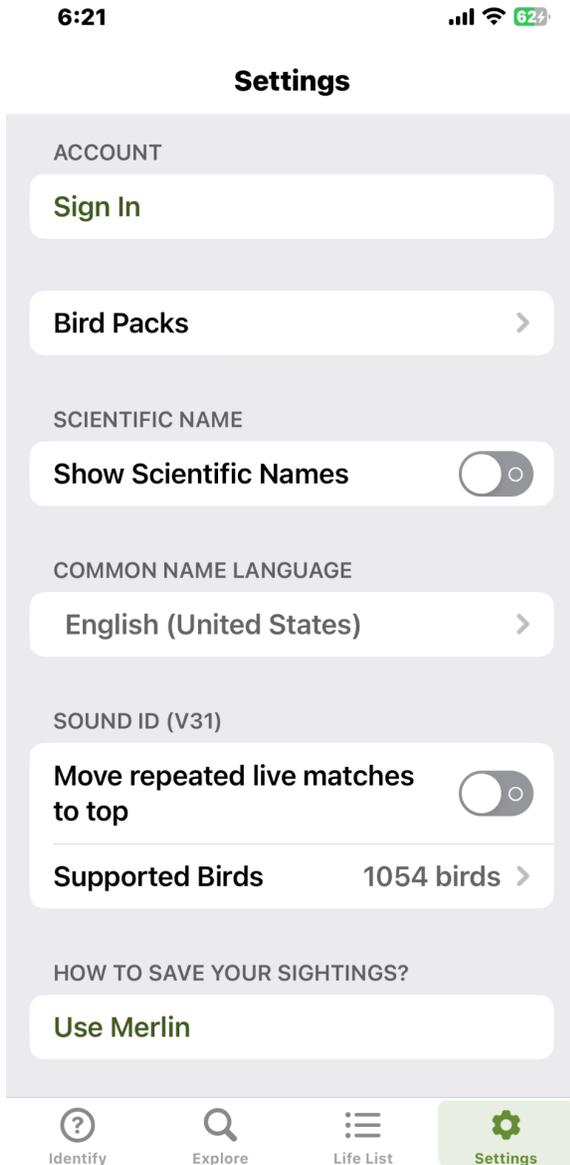
setup steps you'll need to adjust permissions on your phone to allow the app to access your phone's camera and microphone, and/or to download a Bird Pack for our area.

## 2. Open the Merlin app and link it up with your existing Cornell Lab eBird account, OR Create your new Cornell Lab account

Once the Merlin Bird ID app is downloaded and new users have set it up, go to your phone's home screen to find it (white icon with black stylized flying bird). Tap the app to OPEN it, the Merlin home screen looks like this. Within the Merlin app, everything works the same whether you're on iPhone or Android.

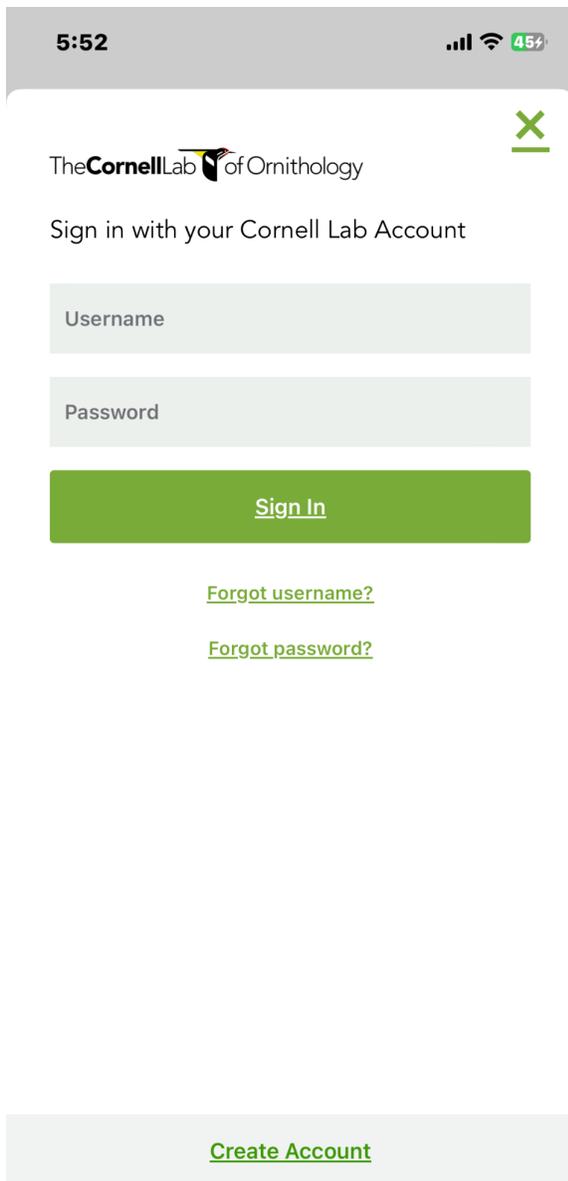


Tap the *Settings* icon (looks like a gear) at the bottom right corner of the Merlin home screen. The Settings page will open, see below.



If you see *View Account* at the very top, instead of *Sign In*, it means your Merlin app is already signed in to your Cornell Lab account. You can tap *View Account* to verify your email address and add information. Don't tap *Sign Out*, you never need to Sign Out.

However, if your screen says *Sign In* at the top, tap *Sign In*. You'll see this screen next:

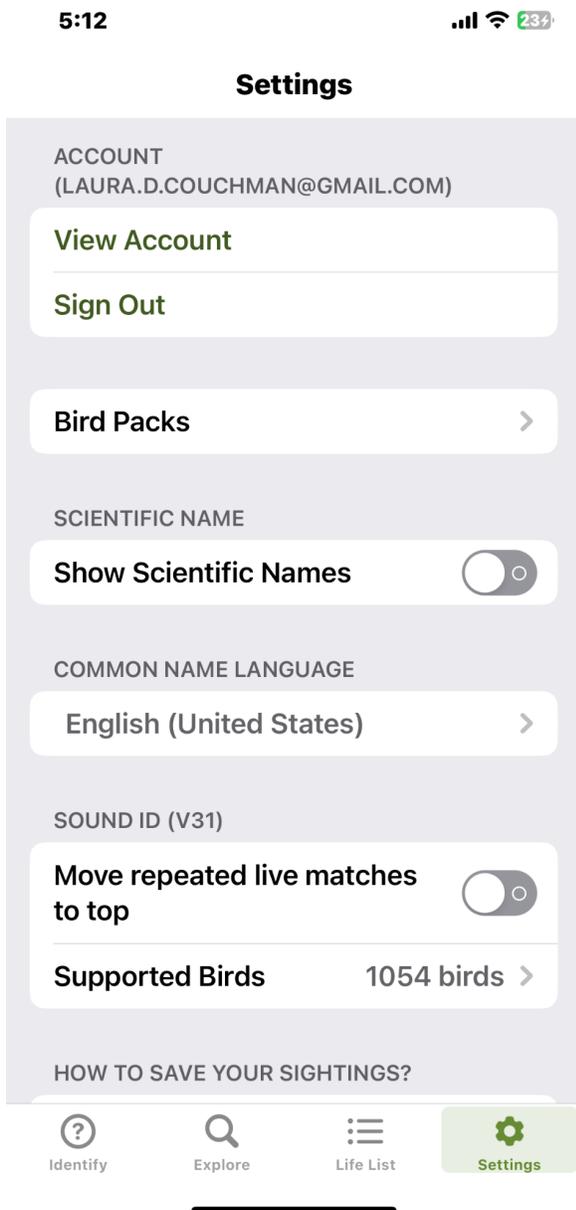


If you already have a Cornell Lab username and password, find that information and sign in. This will ensure that your Merlin Bird app is linked to the same account you use for eBird.

If you are entirely new to the Cornell Lab suite of tech tools, tap *Create Account* at the bottom of the screen and follow the steps to create your account. Write down the username and password you choose so you'll be able to find them later.

I happen to use my email address as my username, but you can choose a different username if you wish.

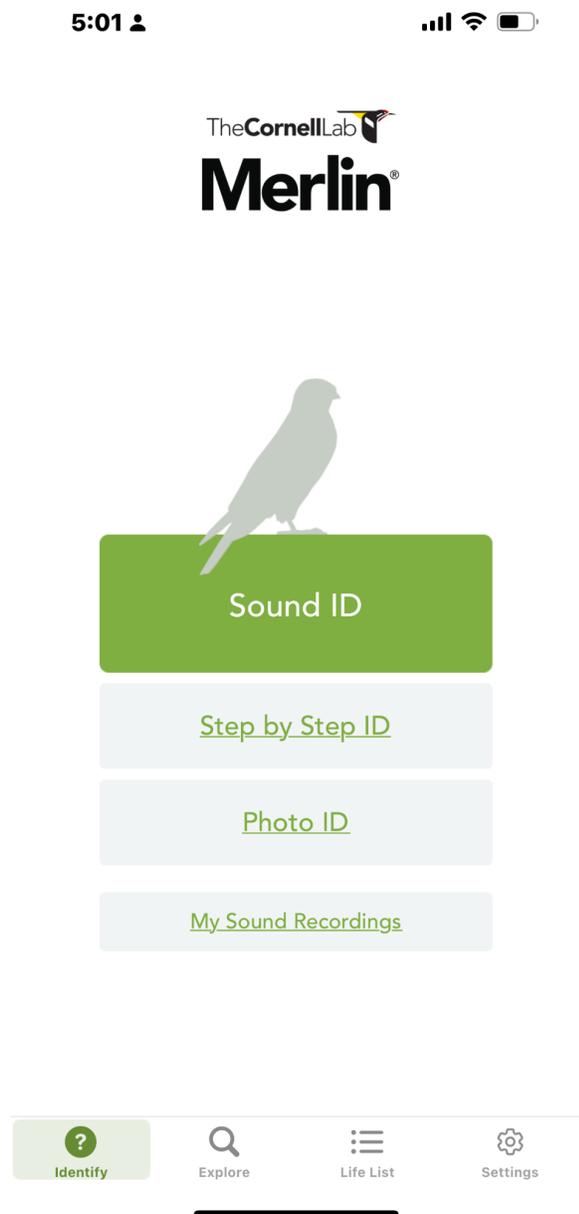
Once your account is created and you sign in to it, your *Settings* screen will look like this, with your account username at the top.



Hooray! You'll never need to tap *Sign Out* (but if you do by accident, just use your Cornell username and password to sign in again). Because you're always signed in even if the app is closed or your phone is off, whenever you tap the Merlin Bird ID app on your phone's home screen you'll go straight to the Merlin home screen so you can start identifying a bird.

Now, practice getting back to the Merlin app home screen. From the *Settings* screen, look in the bottom **left** corner of your phone for the *Identify* icon (circle with question mark). Tap this to return to the Merlin home screen.

OR, you can get to the Merlin home screen from your phone's home screen. Find the Merlin Bird ID app you just downloaded or updated (white background, stylized black bird flying to the right) and tap to open it. The Merlin home screen looks like this:



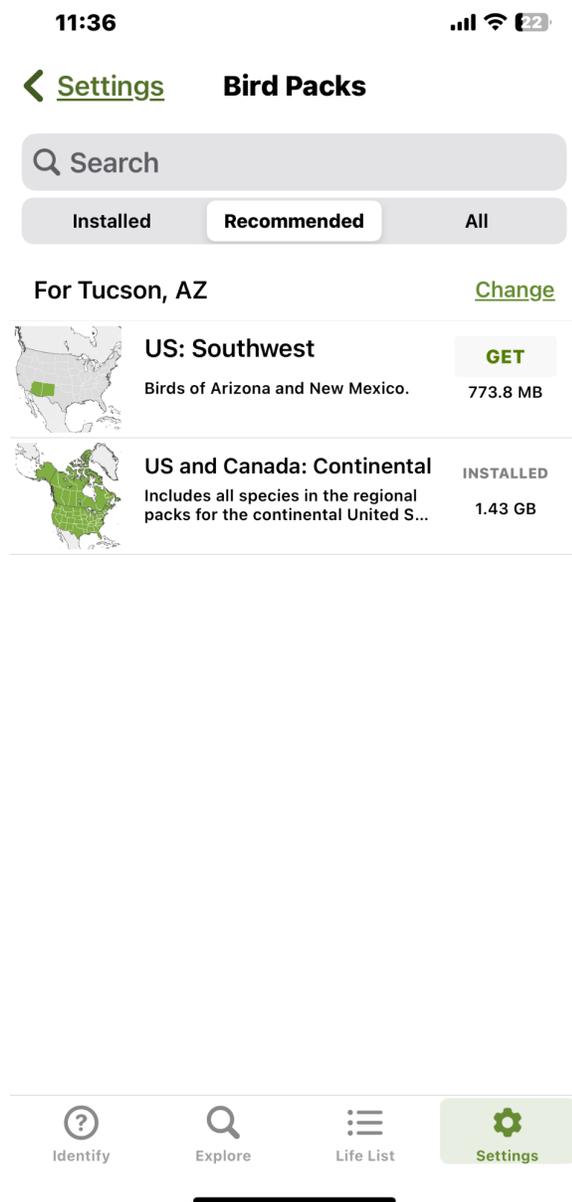
### 3. Review other Merlin app Settings

From the Merlin home screen, once again tap the *Settings* icon at the lower right. As shown on the *Settings* page screenshot above, *Show Scientific Names* and *Move repeated live matches to top* should both be OFF.

Slide down to see and tap the box under *HOW TO SAVE YOUR SIGHTINGS?* It should say *Use Merlin*. If it says *Use eBird*: tap it, turn the *Use eBird* button OFF, then tap outside the box to close. eBird is a great tech tool and a different way to record your sightings, but it's a topic for another time.

#### 4. Load Bird Packs

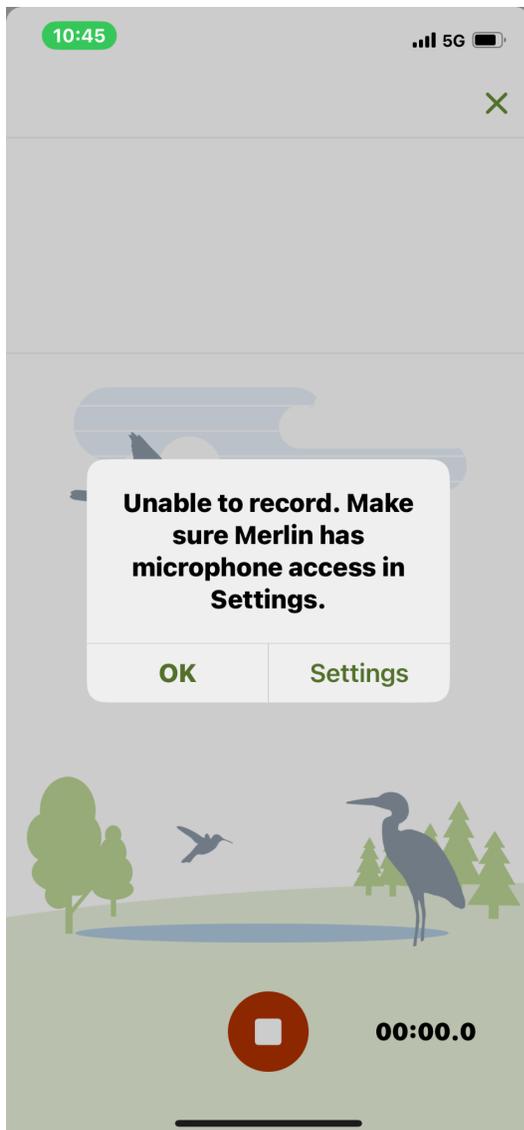
On the *Settings* page, slide back up so you can see *Bird Packs*, and tap it. Bird Packs are region-specific databases that you'll download onto your phone, enabling Merlin to function even if you are not in range for cell service. You'll need to have a Bird Pack loaded in order for Merlin to work.



On this page just below the *Search* box, tap *Recommended* in the center. You have two choices: *US: Southwest*, or *US and Canada: Continental*. If your phone is older or doesn't have a lot of storage space, tap GET for *US: Southwest*. If you expect to travel outside Arizona, tap GET for *US and Canada: Continental* to load the data for birds you might see throughout the US and Canada, including the Southwest data. Then tap INSTALL. It will take several minutes to load your Bird Pack, you'll see the progress bar. If it is VERY slow, you could try it again after turning off your phone's WiFi, it might load faster over cellular.

**5. If necessary, use your phone's Settings to give the Merlin Bird ID app needed permissions to access your Photos, Camera, and Microphone**

In order for Merlin Bird ID to work, you need to give permission for the app to use your phone's Photos, Camera and Microphone. If any of the needed permissions were not enabled during initial setup, while you are using Merlin you'll see a popup box to ask for any permissions you haven't already granted, for example:



If this happens any time while you are using the Merlin app, just tap *Settings* to open your phone's *Settings*, and say *Yes* or *Allow* to grant any needed permissions. It's OK to grant permission "while using the app." Once you give permission, the Merlin app will remember it and you won't see this screen again.

**Congratulations!** You are now ready to use the Merlin Bird ID app in the field! When we are together, we'll learn and practice the fun features of the app, and I'll answer your questions. DON'T PANIC if you have trouble! Try again; and if you really get stuck, just bring your phone and yourself a few minutes early and we'll review the setup steps in person together before we start birding. But I hope most of you will have your setup done before we meet, so we can use most of our time together learning and practicing the Merlin Bird ID app's features.