

 **MERIDIAN**
USER'S GUIDE
2022

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Introducing Meridian Enterprise

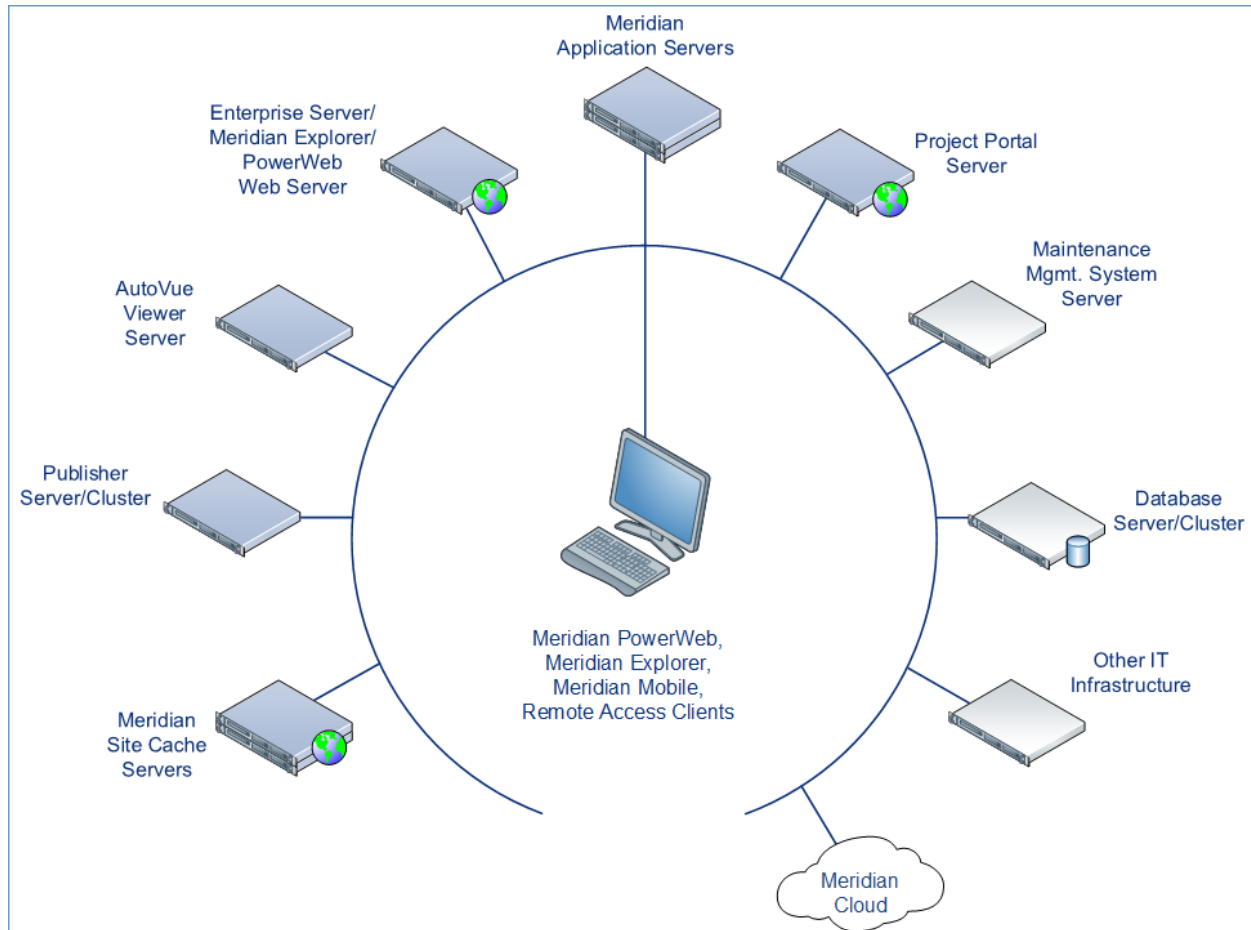
Meridian Enterprise is a departmental to enterprise-wide engineering information management (EIM) and asset lifecycle information management (ALIM) system from Accruent. It can be installed with the following database engines: Accruent Hypertrieve, Microsoft® SQL Server®, or Oracle®. The number of vaults, documents, and concurrent users is limited only by available hardware resources on the host server computer. For the supported versions, see the *Supported Software* document for this release of Meridian available from your Accruent Partner or the [Meridian Technical Library](#).

Meridian Enterprise Product Suite

Meridian Enterprise is the core of the Meridian Enterprise product suite—a family of solutions that extends Meridian Enterprise into the engineering-related business processes for specific industries:

- Chemical
- Pharmaceuticals
- Oil & Gas
- Metals & Mining
- Utilities

The Meridian Enterprise product suite includes optional modules and alternative channels of data publishing as shown in the following figure.



For more information on any of the Meridian Enterprise product suite solutions, contact your authorized Accruent Partner or visit accruent.com.

Meridian Enterprise Server

Meridian Enterprise Server is the core product in the Meridian Enterprise product suite. It provides centralized, scalable, web services and administration for use with Meridian Enterprise, Accruent Project Portal, and other business systems. Besides the shared services, Meridian Enterprise Server includes the latest generation of Publisher and Meridian Explorer technology.

Although the names Meridian Enterprise Server and Meridian Enterprise are very similar, Meridian Enterprise Server should not be confused with the application server of Meridian Enterprise. They are distinct systems that work together. Throughout this documentation, each name is used explicitly for its corresponding system.

Note:

Meridian Enterprise Server 2013 (and higher) is a replacement for prior versions of Publisher and Meridian Explorer that has been completely redesigned and reprogrammed. This allows Meridian Enterprise Server to provide additional functionality over prior versions. Although

Meridian Enterprise Server has many of the same features as prior versions of Publisher and Meridian Explorer, the products are not compatible and Meridian Enterprise Server 2022 should not be considered as a direct upgrade from the older versions.

Meridian Advanced Project Workflow Module

The Meridian Advanced Project Workflow Module establishes a project structure for managing engineering content work-in-progress. Master documents are available for maintenance and operations in an as-built area, while working copies are made in project areas. The Meridian Advanced Project Workflow Module also allows you to manage multiple concurrent projects that share documents. It provides a way to merge design changes into a new version of the master document in a controlled manner and lets you handle small changes as well as complex capital projects based on pre-configured projects and workflow templates. Its advanced tools let you control and monitor project progress.

Meridian Asset Management Module

The Meridian Asset Management Module enhances, automates, and streamlines asset operations throughout their lifecycle by linking them with engineering content such as drawings and technical specifications. The module allows you to integrate with maintenance management systems like Maximo, SAP PM, Datastream, and Ultimo, and with Facility Management Systems like Archibus and Famis. This ensures the performance of mission-critical assets and avoids costly operational disruptions. Maintaining control of and providing access to up-to-date documentation is crucial in all phases of the asset life cycle.

Meridian Explorer

Meridian Explorer provides a repository separate from the engineering production vault and a web browser-based view of documents and related information in one or more Meridian Enterprise vaults. These two components make it possible to provide read-only access to technical documents on a large scale. Meridian Explorer provides an innovative interface for quickly and easily finding documents with minimal end-user training.

The main benefits of Meridian Explorer are its powerful search, ease of use, extensive configurability, and scalability. You can easily navigate your way to the document you need and view its information with just a few mouse clicks. Meridian Explorer provides you with text search capability on both custom metadata properties and document text content. You can also find documents by navigating a folder tree. Best of all, you can search a repository interactively by selecting from specific property values found in the current search results. With this method, you can quickly narrow your search from potentially hundreds of thousands of documents to just the

documents you are interested in. Search results are presented in tabular format or as easily recognizable thumbnail images.

Meridian Explorer includes the following major features:

- Incremental synchronization of documents and related metadata from one or more Meridian Enterprise vaults to a Meridian Explorer consolidated repository.
- Zero install, web browser-based read-only client. Engineering change requests and electronic redlines can be sent to vaults configured with the Meridian Asset Management Module.
- Support for server-based viewing.
- Configurable property pages, search pages, and views.

Note:

Meridian Explorer manages documents and tags very similarly. Therefore, they are referred to collectively as *items* in the topics that refer to both documents and tags.

Meridian FDA Module

The Meridian FDA Module adds U.S. Food and Drug Administration 21 CFR Part 11 regulatory compliance features to Meridian. Its advanced document control tools are used by pharmaceutical companies throughout the processes of document creation, review, approval, revision, and archiving.

Publisher

Publisher helps you publish engineering data managed by Meridian to alternative formats in other document management systems, file systems, or the Internet. It enables the reliable and timely availability of documents in other systems such as FileNet, Livelink, SharePoint, web portals, or email.

Publisher can optionally render documents in the source system to a different file format before publishing them to the destination system. Publisher combines these two actions—rendering and publishing—in a *publishing job* that it can run either on demand, as a scheduled task, or in a scheduled batch along with other jobs. Publisher provides links to the most common engineering document management systems. Publisher also includes rendering modules for the most popular engineering content authoring applications. Additional links and rendering modules are under development by Accruent.

Publisher includes application links that can be installed to simplify publishing documents from within source document management systems, such as:

- Meridian Enterprise
- Meridian Portal
- Accruent Project Portal
- Microsoft SharePoint
- Any Windows file system

The links add documents to the publishing queue, which can be managed through a website installed on the Meridian Enterprise Server computer or a separate web server. The queue can be viewed and controlled using any web browser from anywhere on the network.

What's In This Guide

This guide describes the use of Meridian end-user applications to perform everyday document management. Meridian server administration is documented in the *Meridian Enterprise Administrator's Guide*. Configuration of Meridian vaults is documented in the *Meridian Enterprise Configuration Guide*.

This guide describes:

- High-level concepts employed by Meridian
- The capabilities of the client applications, PowerUser and PowerWeb
- How to browse, navigate, and search Meridian vaults
- How to use Meridian to create, view, modify, redline, and print documents
- How to use workflows to manage document changes
- How the Meridian client applications integrate with other applications

Who Should Read This Guide

This guide is intended for document control staff, documentation managers, authors, editors, reviewers, and information consumers who are familiar with, and have experience in:

- General personal computing concepts
- The use of various document types in everyday business situations
- Basic document control methodologies such as revision control
- The Windows® operating system, including its use in a network environment

Technical Support

Technical support for Accruent products is available from a variety of sources if you have an active support contract. Your first source of support is the authorized contacts designated by your company to participate in the support contract. They are the persons that are responsible for resolving problems with Accruent software before contacting outside sources of support. If your company works with a Accruent Partner, that partner is your second source of support. Accruent Partners are responsible for providing technical support to their customers in order to maintain their status as Accruent Partners. Accruent will assist the partner company, if necessary, to help resolve your problem. If your company is a direct Accruent customer, your authorized contacts may communicate directly with Accruent to resolve your problem.

Accruent Partners and direct customers have access to all of these Accruent technical support resources:

- [Support Cases](#) – around the clock support issue entry, update, and status
- [Meridian knowledge base](#) – continuously updated problem solutions, minor releases, updates, and how-to articles about advanced techniques
- Email notifications – immediate alerts to support issue status changes
- Telephone support – direct access to highly qualified software support engineers with extensive experience in Accruent products

The available support contract options, terms, and other details are described in documents that are available from your Accruent Partner.

EDM Principles

Engineering data management (EDM) is a generic term for a wide variety of functions. In general, it is the process of managing engineering documents throughout their life cycle, from inception through creation, review, storage, and distribution all the way to archiving or destruction. Depending on specific requirements, document management is different for every customer.

Before computer technology became widely available, a document was generally defined as a piece of paper: a memo, a letter, a transmittal note, a drawing, or an invoice. The paper presented information—usually text and graphics—for the purpose of communication. In EDM, a document is seen as containing numerous types of information: text and graphics as well as data, spreadsheets, CAD drawings, images, video, and voice. Documents are vessels for information.

There are two specific ways in which documents are used:

- Documents present information.
- Documents develop information.

For example, a marketing manager writes a proposal for a product, and the engineering manager reviews it and adds information. A CAD designer adds detailed specifications, and the manufacturing manager uses this information to build a viable product. Documents are also at the heart of business processes. They are the means of accomplishing an organization's goals and objectives.

Using documents in both of these ways is part of the EDM process, which can also:

- Provide access to archived documents
- Control the production of new documents
- Modify existing documents

Meridian helps you manage your documents and their revisions and allows you to share them with others. Meridian helps you with:

- **Document management** — Document management is built into Meridian with the design team in mind and allows many types of documents to be managed in different ways. A document is defined by its business purpose instead of its file extension. This means that although your project may contain, for example, a .dwg file (an AutoCAD drawing), it can also contain many different types of drawing files.

Meridian allows you to manage all of these different drawing types in their own unique way related to the *business meaning* of the drawing.

- **Revision management** — Extensive document revision management includes a lock feature that prevents users other than the editor from working on locked documents. Several possible revision scenarios may exist, depending on how your system has been configured.

- **Approval and change management** — Documents may go through any of several possible *workflows* based either on the document type or the change type. This supports change management so that you can adhere to the business process and quality procedures.

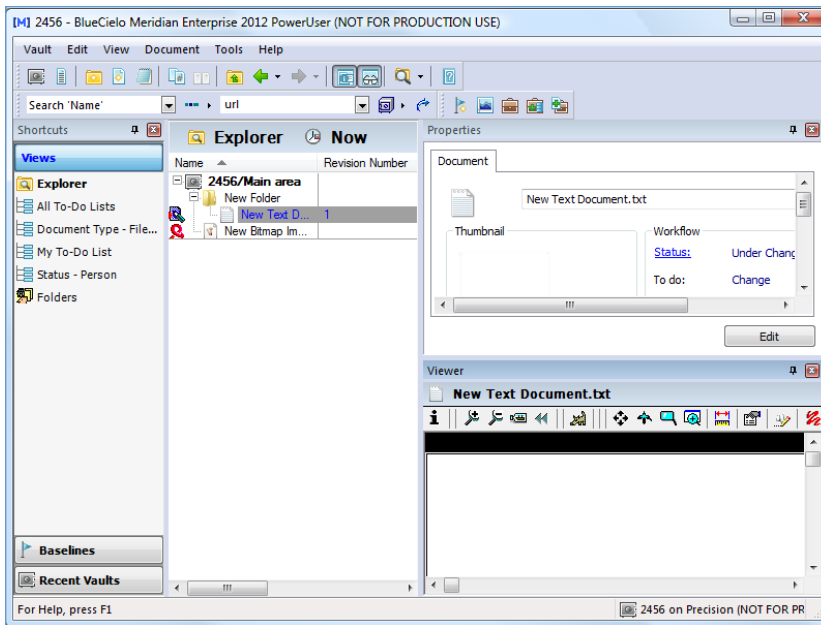
Alternatively, you can manage many documents together using project folders.

Meridian Enterprise Basic Concepts

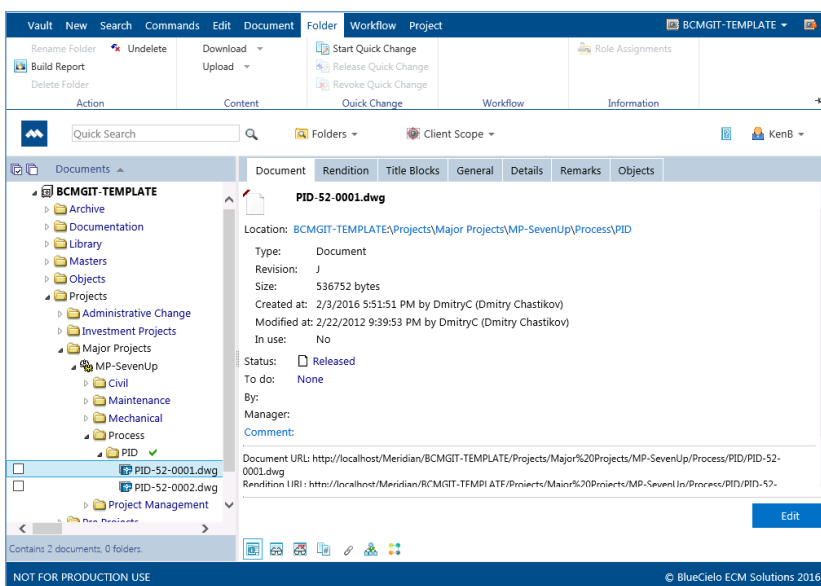
The concepts, features, and terminology described in this section will help you follow what comes later in this guide.

Meridian Client Applications

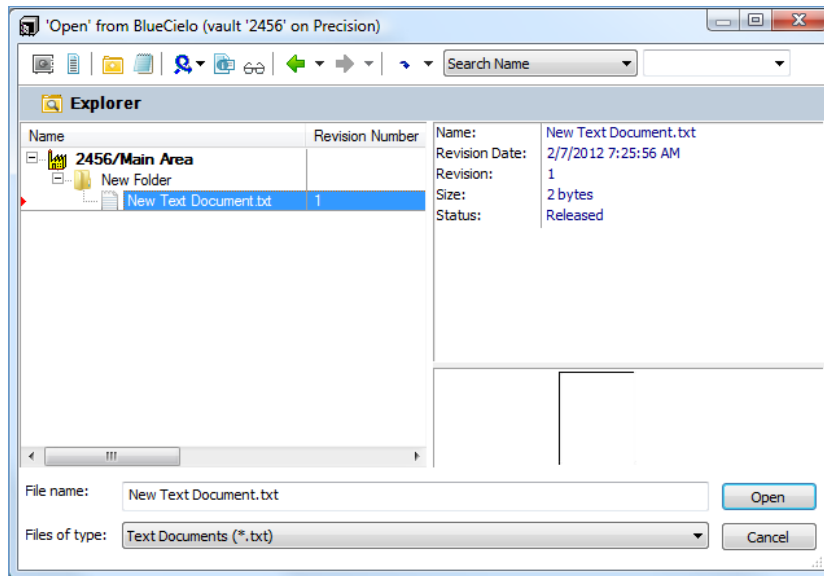
The *client side* of Meridian runs on your local computer. Its applications communicate with the server processes to retrieve documents and information from the server. Meridian allows several types of clients to access the server. The following figure shows Meridian PowerUser for use in a LAN environment. It is described in [PowerUser](#).



The following figure shows PowerWeb for use over the Internet, using the company's intranet or extranet. It is described in [PowerWeb Features](#).



The following figure shows the Meridian Application Integration client, which integrates seamlessly with every Microsoft Windows-compliant file-related dialog box. It is described in [Application Integration](#).



Application links to popular office and engineering programs also provide interfaces to the Meridian vault. An up-to-date list of supported application versions is available from your Accruent Partner or the Accruent extranet.

Shortcut Menus

Meridian features shortcut menus that can be opened in:

- Views in the navigation pane
- **Revisions, References, and Project Copies** view in the document pane
- Viewer window

These menus give you quicker access to the commands you use most without having to select them from the menu bar. The commands that are available are a subset of the commands on the menu for the selected object type. For example, the shortcut menu shown for a document contains a subset of the commands that are shown on the **Document** menu. For descriptions of the commands, refer to the corresponding menu topic. If you have multiple object types selected (for example, folders and documents or documents of different types), the shortcut menu may show commands that are applicable to each of the individual object types. However, some of the commands may not be applicable to all of the selected objects in the same operation. For the best results, perform operations with selections of objects that are the same type whenever possible.

You open shortcut menus by right-clicking the object or selection that you want to work with. Right-clicking also makes the item the selected item just like left-clicking does. Selecting additional items for the same operation (by holding down the Ctrl or Shift key while clicking) does not select a different item.

You open a shortcut menu in the viewer window by right-clicking anywhere within the window. The shortcut menu of the viewer window lists different commands depending on the format of the selected document. This shortcut menu is not customizable.

See [Personal Options](#) on how to customize the PowerUser document, folder, and vault shortcut menus to display the commands that you want.

Vaults

A *vault* is a combination of a Meridian database and a document store. It contains all of the documents you place in the vault, the data about those documents, all revisions of those documents made in the vault, and redline data for the documents. If some of your documents use references to other documents, such as with CAD files, then those references between documents will automatically be managed by Meridian. This means that you can move files between folders within the Meridian vault (such as from one project to another), and the references will not be lost, because they are managed by Meridian.

History

The Meridian history feature maintains all changes to vault data over time, including revisions to documents. History is enabled or cleared for each vault by a System Administrator.

The last released revision of a document is always the default one shown in a vault. However, by using the **Show Revisions** command, you can see all previous revisions and their effective dates. History also allows you to view the entire vault at a particular moment in time and to save a shortcut to that moment, called a *baseline*. When you view history, all documents and their revisions, property values, and references appear as they were at that point in time. The view includes all released documents at that point in time. New documents and copies of released documents that are under change and have not yet been released are not shown.

While you are viewing history, the background of the application is gray, indicating that the vault is read-only. You cannot edit or create documents in the past. In addition, the context bar and the status bar show the date and time or baseline name that is currently being viewed.

Note:

Support for baselines in PowerWeb must be enabled by a System Administrator.

Scopes

Meridian manages a wide variety of documents and the information about them. Scopes are a way of limiting vault functionality and information to named sets that are easier to understand and use. You may select a scope that more closely meets your needs without experiencing information overload.

Impact of Scopes

Scopes limit your ability to create or work with the following objects:

- Commands
- Document types
- Folder types
- Workflow types
- Project types
- Reference types
- Navigation views
- Reports

Scopes also limit some Meridian functions:

- Folder access is restricted to a folder and its sub-folders that are defined by the scope.
- Searches are restricted to accessible folders.

Note:

You may not work with any other objects than those defined in a scope. If no scope provides the functionality or folder access that you need, select a different scope or consult a System Administrator.

For example, a vault used for managing facilities might define scopes for master documents, design projects, archived documents, or maintenance management. A vault used for managing AEC documents might define a different scope for each customer. And a vault used for manufacturing documents might define different scopes for standard parts, active projects, and inactive projects.

Select a Scope

Selecting a scope allows you to specify the vault objects and functions that you want to work with in the current Meridian Enterprise session. If any scopes are defined in a vault, you must select one when opening the vault for the first time. Thereafter, you may select a different scope that more closely meets your needs. If only one scope is defined for a vault, it is selected automatically. You may select only a scope for which you have the **Can Use** privilege for the scope.

PowerWeb Procedures

Use these steps for [PowerWeb](#).


To select a scope:

- In the toolbar, select a scope name from the scope list.
 - The vault objects and commands that are not available for the selected scope disappear.
 - The vault objects and commands that have been configured for the selected scope appear.

PowerUser Procedures

Use these steps for [PowerUser](#).

To select a scope:

- Choose between two options:
 - On the **View** menu, point to **Change Scope**.
 - To select a scope from the Context bar:
 1. Click the current scope name button  **My Scope** in the Context bar.

A shortcut menu of scope names appears. Scopes for which you do not have the scope's **Can Use** privilege are cleared.
 2. Select a scope name.

The vault objects and commands that are not available for the selected scope disappear. The vault objects and commands that have been configured for the selected scope appear.

Navigation Views

Navigation views are different ways of viewing a vault for different purposes. Each view displays documents organized in a hierarchical tree structure like Windows Explorer, similar to the following figure. The tree structure is determined by a predefined set of properties. You can use Navigation views to find and select documents according to the property values of the documents. Navigation views help you to find documents based on whatever information you know about the documents that you want to find.

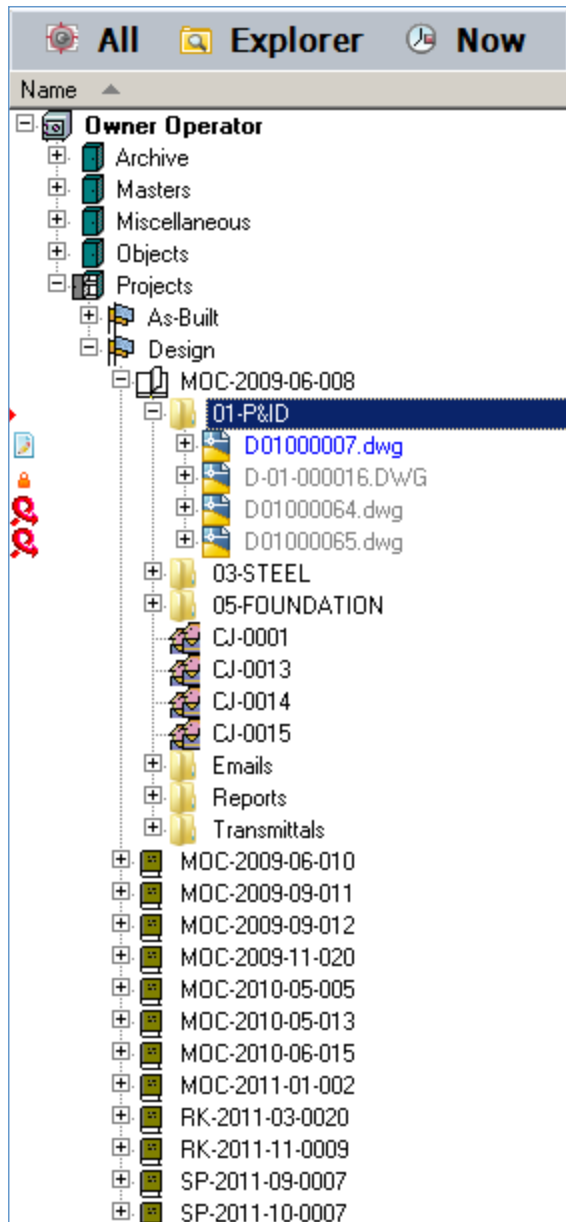
Finding documents with Navigation views is often quicker and easier than finding documents by searching. All Navigation views display only the latest, released revision of documents. Status icons at the left edge of the views show the current workflow status of documents. For descriptions of the possible icons, see [Navigation View Icons](#).

You cannot modify the configuration of Navigation views. Navigation views are configured by a System Administrator and may display:

- Different icons to represent each folder level
- Specific document types only
- Documents with specific property values only
- Different columns of information in each view

To set your personal display options for Navigation views, such as colors, fonts, and gridlines, see [Personal Options](#).

Default Navigation Views



All vaults have the following five views available by default:

- Folders
- All To-Do Lists
- Document Type - File Type
- My To-Do List
- Status - Person

Ways to Use Navigation Views

The following list describes how you can use navigation views to easily find the document you're looking for:

- The **Folders** view displays where the documents are physically stored within the vault.
- If you need to find a document but only know who is currently working on it, you can probably find it with the **All To-Do Lists** view or the **Status – Person** view.
- If you only know what document type or file type the document is, then you can probably find it with the **Document Type – File Type** view.

A System Administrator may create additional views based on your organization's unique needs and vault configuration. Each vault can have any number of additional Navigation views, each presenting the contents of the vault in a different structure for different purposes or different groups of users.

Similarities between Navigation Views and Windows File Explorer

The folder structure displayed by Navigation views is similar to that shown by Windows Explorer. However, Navigation views combine the folders that are shown in the left pane of Windows Explorer with the column data that is only shown in the right pane of Windows Explorer into a single view that displays both folders and columns in the same pane. Furthermore, file commands that appear on the Windows Explorer shortcut menu (for example, **Print** and **Open With**) also appear on the Meridian Enterprise **Document** shortcut menu.

Navigation views work similar to Windows Explorer, too. Depending on your security privileges and how the vault is configured, you may be able to:

- Expand or collapse folders
- Create and delete folders
- Drag and drop folders and documents between vault folders or between the Navigation view and Windows Explorer or the desktop
- Run commands on the contents of Navigation view folders (PowerWeb only)

Select a Navigation View

Selecting a Navigation view allows you to view a vault contents using different criteria than just the folder names of the **Folders** view. Selecting a different Navigation view can make performing some operations easier. You may select only a Navigation view for which your current security role has been granted access.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To select a Navigation view:

1. In the toolbar, select a view name from the view list.
The view pane displays the vault contents using the view definition.
2. Click the icon or name of the folder that best matches the information you know about the document you want find.
The folder opens to reveal its contents. To close the folder, click it again. A green check mark ✓ indicates the current folder.
3. When you find the document you are looking for, click the document name hyperlink in the Navigation view.
The document's property pages appear. Click the document's icon in the Navigation view instead to view the document in a viewer window.

PowerUser Procedures

Use these steps for [PowerUser](#).

To select a Navigation view:

- Choose between three options:
 - To use the shortcut menu:
 1. Click the current Navigation view name button in the Context bar.
A shortcut menu of Navigation views appears. Navigation views for which you do not have access are cleared.
 2. Select a Navigation view.
The view pane displays the vault contents using the view definition.

- In the **Shortcuts** pane, click the **Views** button and then select a new view from the list that appears.
- From the **View** menu, point to **Change View** and then select a new view from the sub-menu.

Folders View

The **Folders** view is special among all of the Navigation views. It displays the documents and folders as they are actually organized in the vault, similar to Windows Explorer. When you create new documents and move existing documents, you do so relative to the **Folders** view structure regardless of the current view.

The other Navigation views represent logical folder structures based on other document property values. That is, the documents don't actually reside in the folders shown in Navigation views; the folders are simply groupings of documents with the same property values. The **Folders** view also works like Windows Explorer. The same actions you can take in Windows Explorer, like cut, copy, paste and drag and drop, also work in the **Folders** view.

Note:

Meridian security roles are applied at the folder level in the **Folders** view. Thus, your ability to perform certain actions may be different in some folders as opposed to others.

Configure a Navigation View

You can manipulate Navigation views in some of the same ways that you can in Windows Explorer. The changes that you make are saved between sessions.


PowerWeb Procedures

Use these steps for [PowerWeb](#).

Sort Documents by Column

To sort documents in a Navigation view based on a particular column:

1. Click the column heading that you want to sort on and then click **Ascending** or **Descending**.

An arrowhead icon  in the column heading indicates the current sorting column and sort order.

2. Click the column heading again to reverse the sort order.

Change Column Order

To change the order of columns:

- Click the column heading, drag it, and drop it in the desired position.

Change Column Visibility

To change the visibility of columns:

1. Right-click a column heading.
The **Columns to Show** dialog box appears.
2. Choose one or more of the following options:
 - To hide a visible column, clear its check box.
 - To show a hidden column, select its check box.
 - To restore the default column visibility, click **Restore To Defaults**.
3. When you are done setting the column visibility, click **OK**.

Filter Based on Column Values

In addition to the preceding actions, you may also filter the documents shown in the following view types based on the property values of the documents that are shown in these views:

- Search Results
- Dynamic collections


You do this by defining a filter similar to defining a filter in Microsoft Excel. You may only define one filter at a time.

To filter a view based on the values of the columns that are shown:

1. Click the column header of the property upon which you want to filter the view.
2. Click **Filter By**.

A dialog box appears that lists the values that are used by the documents that are shown in the view. By default, no property values are selected.

3. Select the property values that you want shown in the view.
4. Click **Apply**.

The view is refreshed to show only those documents that have the selected property values. A filter icon  appears in the column header to indicate that a filter is active.

Remove Column Filter

To remove a filter on a column:

- Repeat the preceding task and select **Reset**.

The view is refreshed to show the resulting documents.


PowerUser Procedures

Use these steps for [PowerUser](#).

Sort Documents by Column

To sort documents in a Navigation view based on a particular column:

1. Double-click the column heading that you want to sort on.

An arrowhead icon  in the column heading indicates the current sorting column and sort order.

2. Double-click the column heading again to reverse the sort order.

Adjust Column Width

To adjust the width of a column:

1. Hover your cursor over the right column divider of the column that you want to resize until your cursor appears as a double-headed arrow \leftrightarrow .
2. Click and drag the column divider until the column is the desired width.
3. Release the column divider.

Change Column Order or Visibility

To change the order or visibility of columns:

1. Press and hold the **Ctrl** key while right-clicking a column heading.
The **Configure Columns** dialog box appears.
2. To hide a visible column, clear its check box or select it and click **Hide**.
3. To show a hidden column, select its check box or select it and click **Show**.
4. To move a column, click and drag it to the desired position or select it and click **Move Up** or **Move Down** until it is in the desired position.

Filter Based on Column Values

Note:

Filters are disabled when the **Load Navigation view data on demand** option is enabled as described in [Advanced Options](#).

In addition to the preceding actions, you may also filter the documents shown in the following view types based on the property values of the documents that are shown in these views:


- My Search Results
- Dynamic collections

You do this by defining a filter similar to defining a filter in Microsoft Excel.

To filter a view based on the values of the columns that are shown:

1. Right-click the column header of the property upon which you want to filter the view.
A dialog box appears containing filter options and a list of the values for the selected property. The values are those that are used by the documents that are shown in the view. By default, all property values are selected.


2. Clear the property values that you do not want shown in the view.
3. Click **OK**.

The view is refreshed to show only those documents that have the selected property values. A filter icon  appears in the column header to indicate that a filter is active. The icon also appears in the context bar to indicate that a filter is active that might not be visible without scrolling the view pane horizontally.

4. Enable **Remember this filter** to retain the filter settings between sessions.
The filter will also be applied to the other views that can be filtered.

Remove Column Filter

To remove a filter on a column:









- Choose between two options:
 - Option 1:
 1. Right-click the column header of the property for which you want to remove a filter.
A dialog box appears containing filter options and a list of the values for the selected property.
 2. Select **Reset this filter**.
To remove all filters, select **Reset all filters**. The view is refreshed to show the resulting documents.
 - Option 2:
 1. Click the filter icon  in the context bar.
A dialog box appears that prompts you to confirm that you want to reset all column filters.
 2. Click **Yes**.

Navigation View Icons

The current workflow status of documents is indicated by an icon at the left edge of each Navigation view. In addition, a tooltip will display the current status and the current to-do person if you hover the mouse pointer over the status icon.

The following table lists the possible document status icons and their descriptions.

Navigation view icons

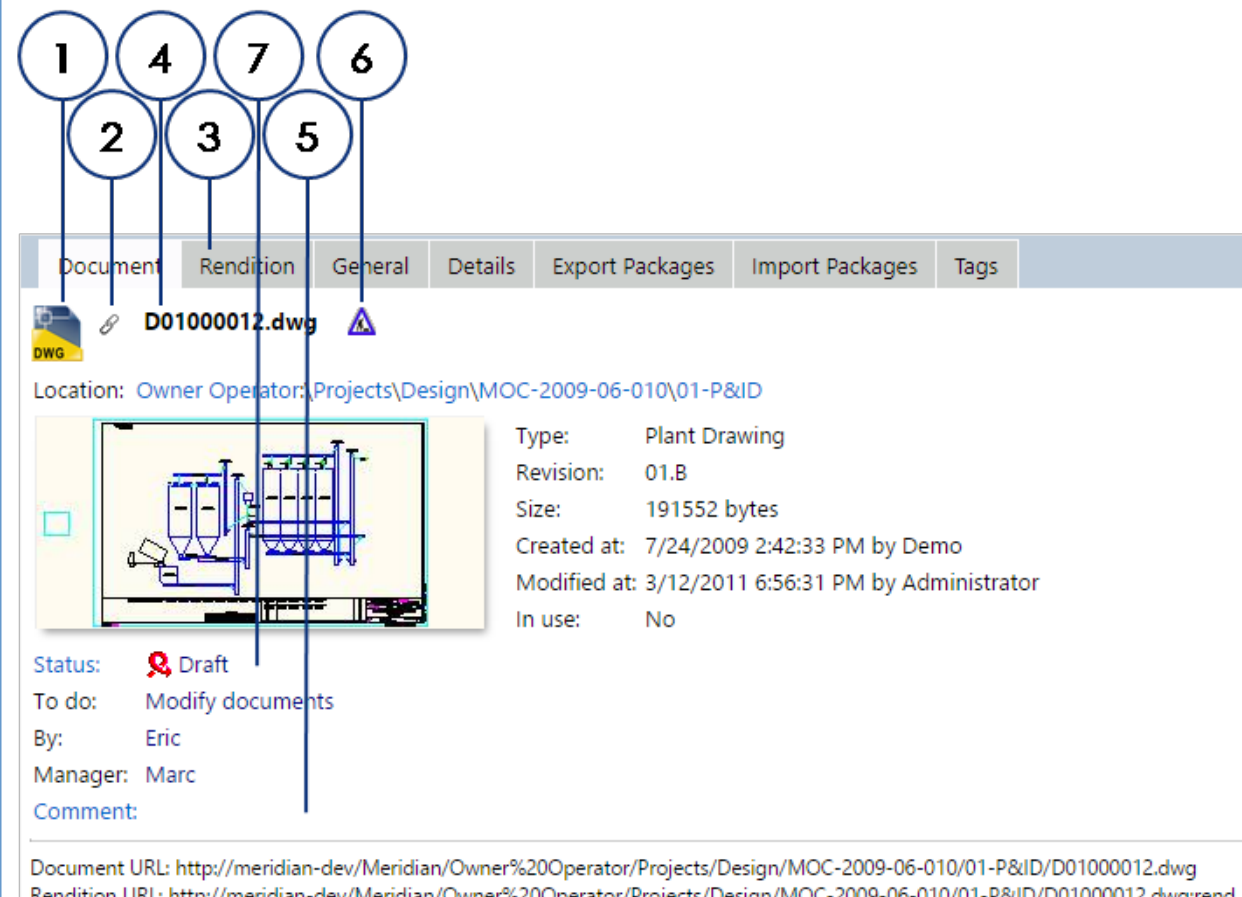
Icon	Description
(no icon)	The document is released, that is, not in any workflow. The document name and all properties shown in the Navigation view columns appear in black text and no icon is shown in the left edge of the Navigation view.
	The document is assigned to you. This blue icon means that there is a workflow task to be completed and you are the assigned person.
	The document is assigned to another user. This red icon means that there is a workflow task to be completed by another user.
  	The document is under change by you. The document name and all property values in the Navigation view columns appear in blue. If this icon is blue, it means that this document has been edited in your local workspace. Other users see a red icon to indicate that this document is being edited in another user's local workspace.
	The document is under change by another user or a project copy is created in a folder.
	The document is in the In Review state of a document type workflow.
	The document is in the Retired state.
(other icons)	Documents currently under the control of a workflow definition may display with icons not shown in this table.

Property Pages

In the Meridian client applications, the detail pane contains property pages (as shown in the following figure) that show the basic properties of the currently selected item: document, folder, or asset tag stored in the vault. Each of these items has at least one property page but may have more depending on the configuration of the item. Empty or partially empty property pages may display during the creation of new documents or folders for you to type required and optional values. The properties shown on a property page may be system properties (**Status**, **Size**, and so on) or custom properties configured by a System Administrator. Property pages can show a variety of icons, links, and other features.

Meridian Enterprise provides the following standard property pages. Not all may be available in your system.

- **Document** — the default page for documents that shows basic system properties and a thumbnail image of the document
- **Rendition** — shows property values that determine how the system generates renditions from the source document
- **Retention** — shows document retention properties that your organization can use to enforce its retention policies. Meridian does not enforce document retention with these properties by default.
- **Tags** — shows the asset tags (stored in the **Tags** branch of the vault) that are linked to this document
- **Title Blocks** — shows the values of title block properties when multiple sheets exist in a drawing
- **Folder** — the default property page for every folder in the **Folders** view



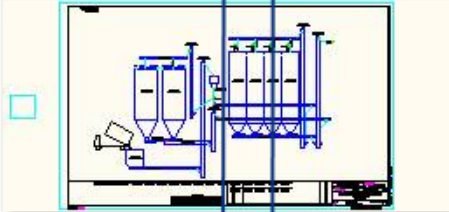
1 4 7 6

2 3 5


Document Rendition General Details Export Packages Import Packages Tags

DWG D01000012.dwg

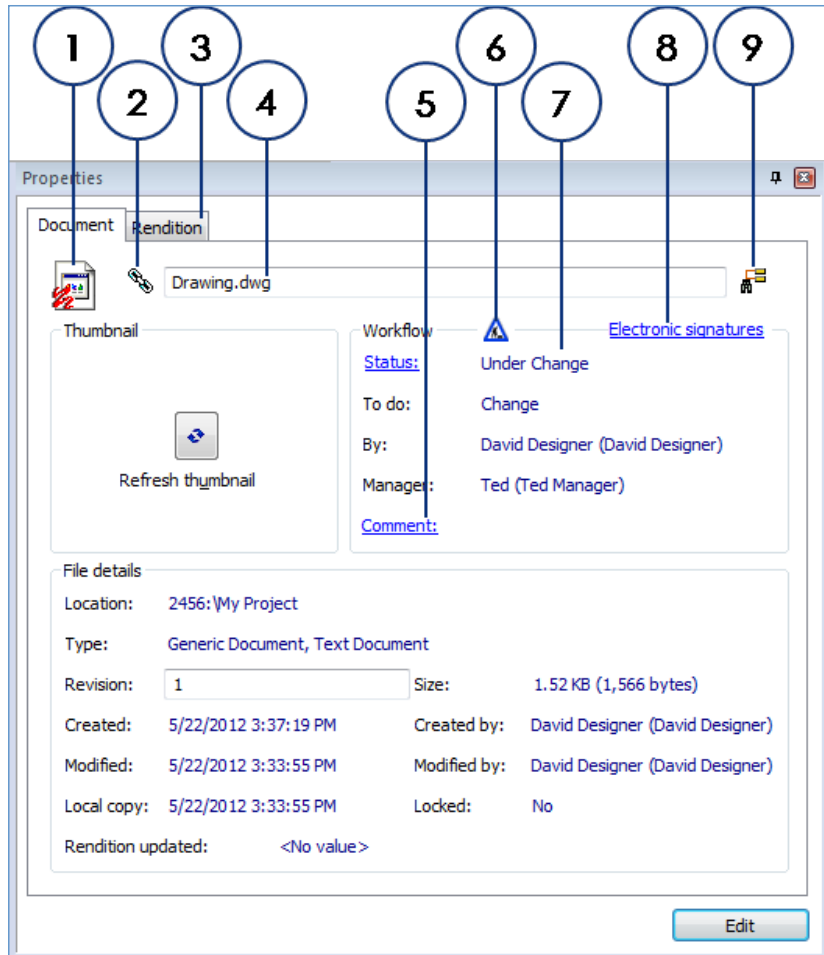
Location: Owner Operator\Projects\Design\MOC-2009-06-010\01-P&ID



Type: Plant Drawing
Revision: 01.B
Size: 191552 bytes
Created at: 7/24/2009 2:42:33 PM by Demo
Modified at: 3/12/2011 6:56:31 PM by Administrator
In use: No




Status:  Draft
To do: Modify documents
By: Eric
Manager: Marc
Comment:






Document URL: <http://meridian-dev/Meridian/Owner%20Operator/Projects/Design/MOC-2009-06-010/01-P&ID/D01000012.dwg>
Rendition URL: <http://meridian-dev/Meridian/Owner%20Operator/Projects/Design/MOC-2009-06-010/01-P&ID/D01000012.dwg;rend>



The following table describes the unique features of the **Properties** pane in PowerWeb and PowerUser.

Property page features

Number	Icon	Description
1		The graphics of this icon are different for each file type and depend on the application registered in Windows on the current computer. Clicking this icon displays the Advanced Document Information dialog box that lists all property information for the selected document.
1		Indicates that the selected document or its rendition has electronic redlines associated with it that can be shown and edited in the viewer.
1		Indicates that the selected document has a rendition associated with it that is newer than the source document and can be shown in the viewer.

Number	Icon	Description
1		Indicates that the selected document has a rendition associated with it that is older than the source document and should be updated.
1		The graphics of this icon may be different for each folder type. Clicking this icon displays the Advanced Folder Information dialog that lists all property information for the selected folder.
2		Indicates that the selected document has references to other documents in the vault. Click this icon to display a graphical diagram of the reference relationships as described in View References .
3	Rendition page	Shows property values that determine how renditions are created from the source document. For more information about renditions, see Renditions .
4	Document name	Also the file name. May be calculated automatically by the system depending on the configuration of the vault.
5	Comment:	Click the hyperlink to display historical workflow information about the document, which includes comments typed by workflow participants when they executed workflow transitions.
6		Indicates that the selected document is either a master document or a project copy. For more information, see Show Master And Project Copies .
7	Status:	Indicates whether the document or folder is in an active workflow. Click the hyperlink to open a dialog box that shows a graphical diagram of the workflow. The current workflow state will be shown highlighted in red. For more information, see View the Current Workflow .
8	Electronic signatures link	Shows electronic signature information for the current document. Typically used only with the Meridian FDA Module.
9		Click this icon to run a search as described in Key Find .

Folders display a similar **Folder** property page that shows the folder's details and, if the Meridian Advanced Project Workflow Module is enabled, details about the project type and project workflow status information. Property pages for existing items may or may not be editable depending on your security privileges and the configuration of the vault. The icons and hyperlinks on some property pages activate commands when clicked.

Documents

Documents in a Meridian Enterprise vault are like files in a file system. They are located in folders where you can copy, rename, move, and delete them. However, vault documents differ from files in a file system in some important ways.

The fundamental difference between vault documents and ordinary files is that Meridian Enterprise distinguishes between a document and its contents. A document's contents may be regarded as the file to which you are accustomed. Meridian Enterprise considers a document to be the file and its container (metadata properties). In Meridian, a document can exist without contents (for example, to represent a hard copy-only document), but contents cannot exist without a container. The contents of a document can be replaced. It is these containers and how to work with them that are described in the following topics.

Document Types

In Meridian, every document is assigned a document type based on the *business purpose* of the document, which may not be related to its file extension. Examples of document types are memos, specifications, drawings, project plans, and so on. Practically every type of document your organization uses can be a Meridian document type. The same document type can be assigned to any kind of file such as a vector drawing, a raster image, a text file, a spreadsheet, a database file, or a word processor file. In addition, the same file type may belong to different document types. For example, a floor plan drawing is very different from a manufacturing part drawing. They may both be AutoCAD DWG files, but different document types are assigned to them.

A Meridian document type determines the following characteristics of a document:

- Naming convention
- Revision numbering
- Available file (content) templates
- Workflow
- Metadata properties
- File type associations
- Data links

The appropriate document types for your organization are defined by a System Administrator.

Security for your system may be implemented on a document type basis. This means that access to documents will be granted based on what type of document they are, rather than the folder in which they reside.

The following topics describe each of the preceding characteristics.

Document Naming And Location

Every vault document has a name and a location. Depending on the vault configuration, these may be controlled by the system. A document's name may be controlled by its document type. A document's location may be controlled by a feature of the vault configuration named the *Field-Path definition*.

A document type may implement automatic naming or it may not. If it implements automatic naming, you may or may not be able to type a document's name when you create or import the document. The document type may calculate the document name automatically based on other information you select or type about the document at the time of document creation, such as project number, sheet number, title, and so on. The calculation may also include an incremental identification number. For example, specified the following naming convention:

`<ProjectNumber><DocumentType><SheetNumber>`

An automatically calculated document name might be: 2009Plan001. Automatic document naming ensures that documents are consistently named for easy retrieval and identification.

File systems can store documents in folders to give a logical structure for easier organization and retrieval. Meridian supports the same kind of logical structure through its **Folders** view, but it takes the concept a step further with the *Field-Path definition*. The Field-Path definition is similar to the automatic naming convention described previously except that it applies to the vault's folder structure. This means that the structure and names of the folders in the vault can be determined by information about the documents they contain. For example, specified a Field-Path definition that looks like this:

`Projects\<ProjectStatus>\<ProjectName>\<SubprojectName>`

The Field-Path definition might create the folder path:

`Projects\In Design\WellBuilt Addition\Structural Framing`

Each vault can implement a different Field-Path definition or none at all. If not, you can create its folder structure, just as in Windows Explorer.

Revisions

When you process a document through a workflow, Meridian creates a copy of the original document to receive the changes. Meridian may or may not keep the original document depending on the vault configuration. One function of a document type is to determine the revision number of changed documents. Again, whether or not Meridian calculates the revision number is defined by the document type. If the revision number is not calculated automatically, it remains the same after a workflow or may be edited manually.

If the revision number is calculated, the document type determines:

- Whether the number is linear (1, 2, 3, 4, ...) or hierarchical (1.0, 1.1, 1.2, ...)
- Whether the number is initially blank
- Whether the number includes separator characters (hyphens, underscores, or decimal points)
- When the revision number is incremented

For example, a newly created document may start with no revision number, but when it is revised for the first time later, it might become revision 1. Further revisions may be assigned revision numbers 2, 3, 4, and so on.

Some documents that are for reference only and are not revised, such as photographs, may have no revision number.

Hierarchical revision numbers are often used to indicate changes made in project folders. That is, a document may be revision 1 and a copy made to a project folder for revision. When the document is placed in a workflow, the document may become revision number 1.1 and subsequent workflows inside the folder will produce revisions 1.2, 1.3, and so on, until the completed document is released as master document revision 2.

Automatic revision numbering ensures that revisions are consistently numbered for accurate tracking, retrieval, and identification.

Document Templates

Almost all application software allows the use of templates when creating new documents. For example, Microsoft-Word uses .dot template files, and AutoCAD uses .dwt template files. A document type defines which templates are available for selection when creating new vault documents. A System Administrator maintains the content and configuration of document templates as described in the *Configuring document templates* article in the *Meridian Enterprise Configuration Guide*.

The templates that are available for each document type appear in the document type's sub-menu for easy selection. If no templates are specified for a document type, then the sub-menu lists the file types that are registered in Windows on the current computer. If one of the file types is selected, Meridian will create an empty document in the vault with the file extension of the selected file type. When the empty file is opened for editing from within Meridian, Windows will start the application that is registered for the file type.

Using a standard set of templates ensures that new documents start from the same set of templates and you are guided to select the correct template for the document type.

Document Properties

Meridian stores and displays data about each document called *metadata*. The metadata is stored in *properties*, which can be considered database fields. Meridian uses properties in a manner similar to the way Windows keeps track of a file's name, size, date created, and date modified. The properties in Meridian are used to track and manage the documents and may include such properties as **Revision Number**, **Project Number**, **Status**, **Title**, and many more. The document type of a document determines which properties are associated with the document.

You will encounter three kinds of properties when working in Meridian:

- **Read-only** — You cannot change the values of these properties. Examples are **Creation Time** and **Size**.
- **Restricted** — You can only select a value from a list of standard values.
- **Unrestricted** — You may type a value you want.

Meridian displays properties on property pages. Each property page contains properties that are related to one another in some way. The document type of a document determines which property pages are associated with the document. Every vault document displays at least a **Document** property page that contains basic metadata such as workflow **Status**, **To-Do**, **Location**, **Type**, and so on. Property pages appear for existing documents and may also appear when you create new documents so that you can type any known information. That information may be used to automatically name the document and store it in the correct folder.

Document Security

Meridian Enterprise security is based on default and System Administrator-defined roles that can be applied to the folders of a vault. Each role defines the privileges of the members of the role. The members can be network domain groups, Meridian Enterprise groups (preferred), or individual user accounts. The roles applied to a folder determine what actions the role's members can perform on that folder and the documents it contains. Therefore, you might have more privileges in one folder than another folder.

Document security is also affected by the workflow status of a document. When a document is in the **Under Change** state, for example, only the owner of the document has the privileges to change the document. A document in the **Review** state can be reviewed and annotated by multiple users, but can not be edited by the reviewers in that state.

Document References

Very often, two or more documents may be related to each other. The documents may or may not reside in the same folder. These relationships may be of several kinds.

One kind of relationship is revision-related. This relationship is characterized by the revisions of related documents and is established by Meridian when the revisions or versions are created.

Examples of revision-related documents are:

- Documents created by the **Derive** command — A new document is derived from an existing document.
- Documents created by the **Replace** command — A new document is created that replaces an existing document.
- Microsoft Outlook messages and their attachments.
- Master documents and project copies — One or more copies of a master document are created for concurrent editing in different projects. These documents can be managed by the Managed Change features of Meridian described in [Project Folders](#) or by the Meridian Advanced Project Workflow Module described in [Introducing Meridian Enterprise](#).

Another kind of relationship is content-related. This relationship is characterized by the content of the related documents and is established by the applications used to create the documents.

Examples of content-related documents are:

- AutoCAD X-Refs — X-Refs are drawings that either reference other drawings or are themselves referenced by other drawings. This applies to all derivations of AutoCAD, including Architectural and Mechanical Desktop products.
- AutoCAD sheet sets — Sheet sets are drawing layouts that are printed together as sets.
- Autodesk Inventor assemblies, parts, and drawings — Autodesk Inventor assembly models reference part models, and Autodesk Inventor drawings reference views of assembly or part models.
- SolidWorks assemblies, parts, and drawings — Same as for Autodesk Inventor.
- MicroStation model references — MicroStation models reference drawings to other models or layout views.

The last kind of relationship is business-related. This relationship is characterized by the business processes that use the related documents and must be established by the users of the documents. Examples of business-related documents are:

- Drawings and a bill of materials or a sheet schedule.
- Drawings and specifications, installation and operations manuals, or design calculations.

- Project plans, schedules, and meeting minutes.
- Documents and their related asset tags.
- Any arbitrary combination of documents that are not otherwise related to one another.

In order to represent these relationships in a vault, Meridian uses links called *references*. A reference is a link from one document to another that represents a specific relationship. A document may have any number of references to another document, called *outgoing references*. Conversely, a document may be referenced by any number of other documents, called *incoming references*. Like many other things in Meridian, references are created from templates called *reference types*. Reference types are defined by a System Administrator in the vault's configuration.

References between documents can be created in two ways:

- Automatically by Meridian for the first two kinds of relationships previously described.
- Manually in the Meridian client applications for the third kind of relationship.

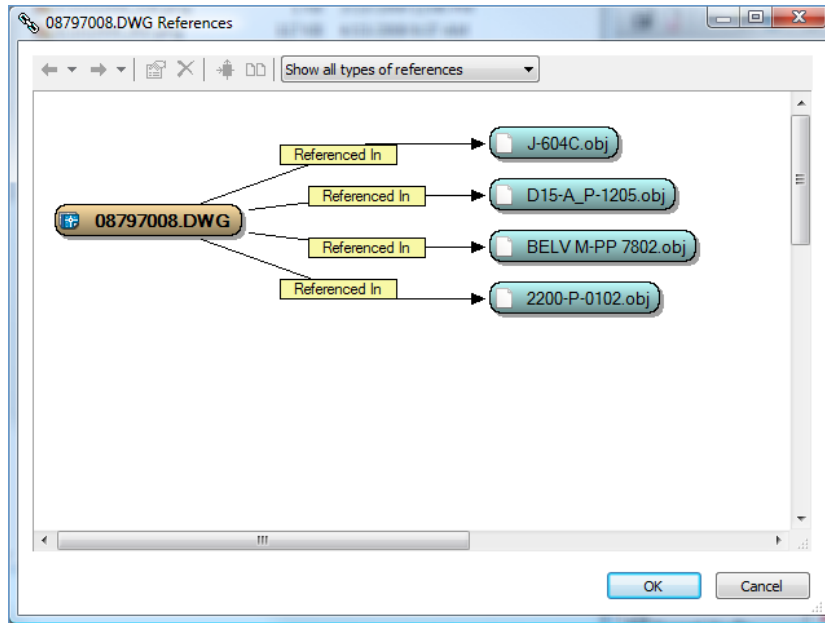
Once they are created, references allow you to quickly find related documents regardless of where they reside in a vault. Referenced documents can be automatically included in search results.

Meridian references are links in addition to, and stored apart from, any links contained within the document file itself. For example, if you insert an external reference into an AutoCAD drawing that resides in the vault to another document that also exists in the vault and you save the drawing, an X-Ref is created in the drawing and a reference is created in the Meridian vault to represent the X-Ref. From then on, Meridian ensures that both references are maintained regardless of where the documents reside in the vault. The same principle applies to the other applications for which there are Meridian application links.

Note:

Microstation does not support hybrid documents.

For example, in the following figure, the current drawing (08797008.dwg) references four other documents (asset tags). These references can also be seen from the other documents.

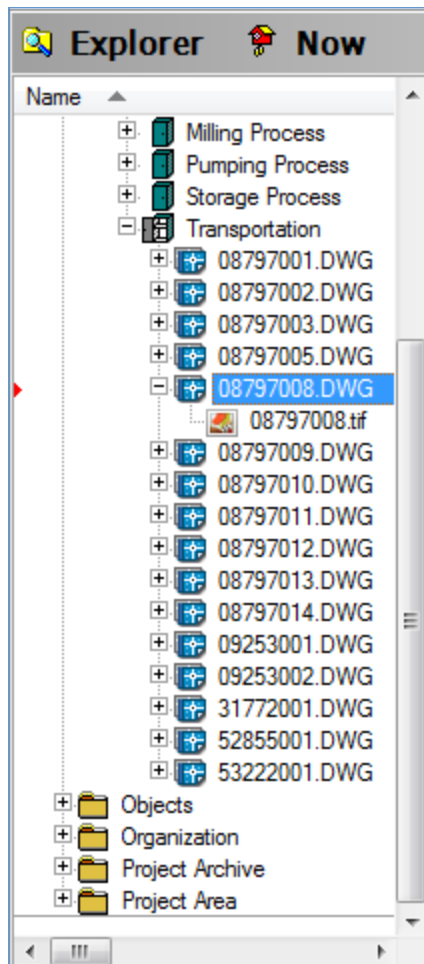


References let you see the possible effects that revising the selected document may have on other documents that may need revising also.

Hybrid Documents

A *hybrid* document is a document whose data is stored in more than one file in the vault. However, the files are treated as one document by Meridian.

All of the files that make up a hybrid document share the same properties (including revision number), workflow, and life cycle. An example of a hybrid document is a CAD drawing that has scanned images inserted into it, similar to the following figure, which depicts a DWG file as the main part of the hybrid document and the TIF file as a subordinate part of the hybrid document.



Which files display as the main part of a document and which files display as subordinate parts of the main document are determined by the configuration of the document type of the main file. Everything that you do to the main document also applies to its parts. For example, if you move a hybrid document to another folder, its parts move with it. If you start a workflow for a hybrid document, its parts follow the workflow too and all member files are editable at the same time.

It is important to distinguish between a *hybrid document* and a *hybrid drawing*. Hybrid documents are created in Meridian. Hybrid drawings are created in a CAD application such as AutoCAD or MicroStation.

A hybrid drawing may also be a hybrid document in Meridian, but not necessarily so. For example, a hybrid drawing may have a raster image inserted into it that resides outside of the Meridian vault. Such a drawing is a hybrid drawing, but it is not a Meridian hybrid document because all of its parts do not reside in the vault. Another example would be a hybrid drawing in which all of the files reside in a vault, but they have not been assigned a hybrid document type. They can still function as a hybrid drawing from within the CAD application, but they will not function as a hybrid document in Meridian.

Likewise, a Meridian hybrid document may not be a hybrid drawing. For example, a word processor document may have a PDF version of it attached to the source file as a subordinate part.

Workflow Types

Meridian Enterprise features different types of workflow that can be used for various purposes. A System Administrator decides which types a vault uses, depending on your organization's business processes and needs. The workflow types are divided into two major categories: project workflow and document workflow. Within each category are different workflow types that can be used either alone or together. Project workflow can be implemented with project folders. Document workflow can be implemented with document type workflow (the workflow defined for each document type), workflow definitions (workflows defined independent of document types), or working copies.

Document Workflow Types

The document workflow types in Meridian allow you to revise individual documents. Document workflows ensure that the steps to produce a new revision are followed in the correct order by the correct persons. For example, a simple document workflow might require that a revision be reviewed before it is released for use. Document revisions can only occur within certain states of the workflow. The commands that change a document from one state to another are called *transitions*. Meridian has different types of document workflow such as: document type workflow, workflow definitions, and working copies.

Working Copy and Legacy Quick Change

Working copies is the simplest of the document workflow types. It consists of only two states performed by two commands, **Create Working Copy** and **Submit Working Copy**. This type of workflow is sometimes referred to as check-out/check-in. It is typically used for master documents that are changed in the course of a project and that require revision control.

You can also revoke a working copy workflow with the **Revoke Working Copy** command.

Quick change works in a similar way to the working copies workflow. The revision number may not be incremented depending on the document type configuration set by your System Administrator. You can use this for master documents that are not changed in the course of a project and do not require revision control.

With legacy Quick Change you can:

- Start Quick Change
- Release Quick Change
- Revoke Quick Change — aborts a Quick Change.

Important!

Revoking deletes the copy of the document that is being changed in the workflow and reinstates the released revision of the original document as the highest revision. If the document was created new in the workflow, it is also deleted but there is no original document to reinstate so be certain that the document will not be needed or a backup copy is kept elsewhere before revoking the document's workflow.

As of Meridian 2021 R2, if your vault is configured to do so, you can use Quick Change as a configurable workflow. This allows more configuration possibilities for your administrator. If your vault is configured to use new Quick Change, workflow events are triggered instead of working copy events and Quick Change privileges are replaced with Workflow settings.

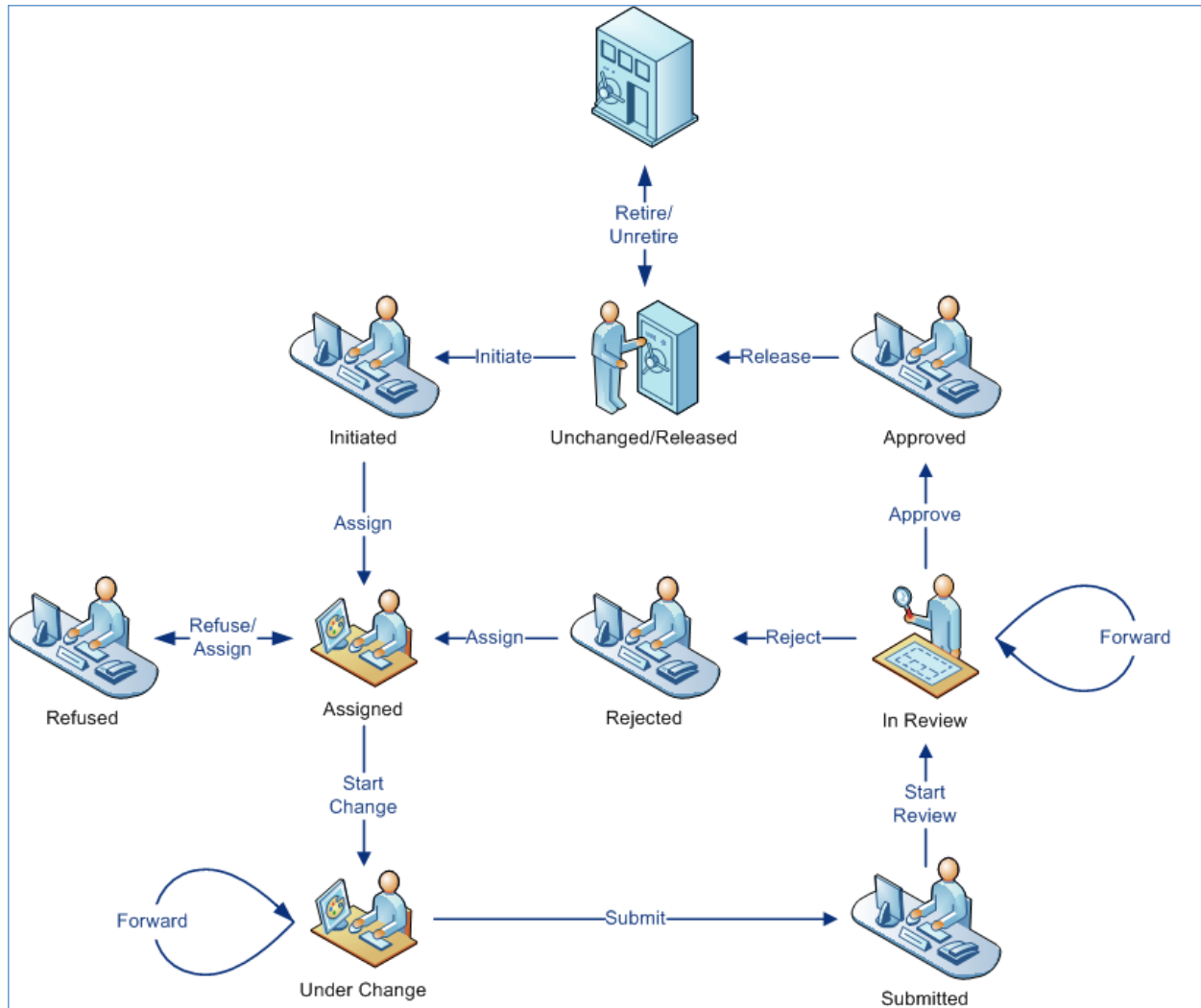
Document Type Workflow

The Document type workflow is moderately complex among the different document workflow types. It controls the major phases of document revision:

1. Initiation of work
2. Work in progress
3. Review and approval
4. Retirement

The progress of documents through these phases can be controlled by a workflow manager who is assigned at the start of the workflow. A System Administrator selects options for these phases that determine which states and transitions the workflow will include. The commands for using document type workflow are named for the transitions between the states and include names like **Start Change**, **Submit**, **Start Review**, **Approve**, **Release**, **Retire**, and **Unretire**. In this workflow type, retiring a document freezes it at its current revision and prevents it from further revision unless it is unretired.

The following figure shows all of the possible states and transitions of a document type workflow. Your organization might not use all of them or only allow users with certain privileges to perform some of the transitions.



Workflow Definition

[Workflow definitions](#) are the most configurable of all the document workflow types. System administrators have full control over the configuration of a workflow definition. Like document type workflow, the commands for using workflow definitions are named for the transitions between the states that the commands run and as such have whatever names the System Administrator specifies.

As of Meridian 2021 R2, if your vault is configured to do so, [you can use Quick Change as a configurable workflow](#). This allows more configuration possibilities for your administrator. If your vault is configured to use new Quick Change, workflow events are triggered instead of working copy events and Quick Change privileges are replaced with Workflow settings.

With the Quick Change workflow definition, you can:

- Start Quick Change
- Release Quick Change
- Revoke Quick Change — aborts a Quick Change.

These actions can be applied to a single document or to a batch of documents.

To navigate through the Quick Change workflow:

1. Select one or more documents.
2. Choose between two options:
 - On the **Workflow** ribbon, select one of the actions in the **Quick Change** section.
 - Right-click anywhere within your selection, point to **Workflow**, point to **Quick Change**, and then select the appropriate action.

Project Workflow Types

The project workflow types in Meridian are used to perform the revision of related documents as a group. Project workflow controls the overall revision process of the entire group of documents that the project includes. Project workflow ensures that the steps of a project are executed in the correct order by the correct people. The documents within a project are revised individually using one of the types of document workflow. For example, a simple project workflow might require that all document revisions be reviewed as a completed set before they can be released for use.

Meridian provides project workflow for project folders. Project folders that can have a workflow are a feature of the optional Advanced Project Workflow Module. The commands for using the workflow of a project folder are named for the transitions between states that the commands run and as such have whatever names the System Administrator specifies. Project folders without workflow are part of the Managed Change feature set of Meridian Enterprise.

Industry-Specific Considerations

Certain industries present unique challenges in document management. When configuring Meridian Enterprise for these industries, consideration must be given to: document workflow, revision control, and project workflow.

The following sections offer recommendations on how these features should be used to meet these needs.

Reference Relationships

Choosing the right revision methodology is vital to managing reference relationships. There are two basic strategies for controlling reference relationships:

- Use document workflow — Parent documents always reference the last released revision of child documents.
- Use derived documents — Parent documents reference the child document revision that was released when the parent was last released.

The following sections discuss each of these strategies and their ramifications on reference relationships. Regardless of the strategy used, the document history displayed in the **Show Revisions** dialog will be maintained as expected.

Note:

When project copies are used, the last released master documents will continue to resolve to the other masters until the project copies are released as new master revisions. When the project copies are released, the master documents will resolve based on the revision methodology used to modify the project copy.

Document Workflow

If you use document workflow (either document type workflow or a workflow definition) to revise a document, when it is placed under change, all parent documents will automatically reference the latest released revision of the document. Under this methodology, it is the responsibility of the editor to ensure that the changes do not negatively impact any of the parent documents. The **Show Where Used** command may be used to assist the editor in identifying the affected documents as described in [View References](#).

Derived Documents

When a document is replaced, as opposed to being placed under change using document workflow, several things occur:

- The original version of the document is retired, but is still visible in the vault **Folders** view. All parent documents continue to reference the original, retired version of the document.
- A new version of the document is created as a new, unique document. A reference is created to tie it to the original version of the document.
- When a document is modified that references the original version, the retired document is detected when the document is opened in a CAD application. The user is shown the option to replace the original version with the new version of the document.

This strategy is useful for ensuring that parent documents are only updated when an explicit decision has been made to revise the parent. Replacing versions also ensures that a specified version of a parent document will always resolve the correct child documents, even in historical contexts.

Library Components In Manufacturing Environments

Many CAD applications today include vast arrays of library parts that can be used on the fly, but there are some serious points to consider before these should be used. Whereas document management should enforce control over documents, many of these CAD applications are inadvertently providing ways to bypass standards and allow users to select from an unlimited array of component types and sizes.

From a standards management point of view, it would be preferable to disable (that is, not install) the libraries for most users, and only install them on the computer of the persons responsible for creating and maintaining company standards. This person would then create all company-standard models, and store them in the correct vault location for general users to access. In this way, users may only select the standard, approved components that are stored in the Meridian vault.

Using this methodology realizes the following advantages:

- Company standards are enforced.
- Meridian references displaying the assembly structure and where components are used accurately reflect all components used in assemblies.
- Models of raw material items, such as tubing and beams, can be derived to individual models to reflect the correct cut length for that instance.
- Standard items are approved once and simply reused in projects rather than creating duplicate components for each project.

We recognize that these libraries are often a selling point for the CAD applications and that the initial creation of the standard library models and drawings may require significant effort. However, document control, standards, and stock levels are also very important issues for the end-user company. Manufacturing companies simply cannot afford to keep the infinite varieties of stock that would be required to allow designers to use any hardware type available.

PowerWeb Features

PowerWeb allows you to work with vaults in a supported web browser. It's a lightweight and easy to use alternative to PowerUser. In combination with the Local Workspace Client app, PowerWeb provides the same level of integration with CAD applications, Microsoft Office, and Windows applications in general as PowerUser.

Important!

PowerWeb saves session information on a per-user basis. This differs from PowerUser, which saves information on a per-session basis. To prevent errors and lost data, do not log on to multiple sessions of PowerWeb simultaneously with the same user account.

If you will be viewing documents or making changes to them with PowerWeb, only log on to Meridian with the same account with which you logged on to Windows. This will ensure that the correct versions of documents are managed in your local workspace.

If you will be making changes to documents and your connection to the Meridian application server is not over a LAN, set Application Integration to Remote mode as described in [Application Integration Options](#). This will synchronize the vault with your changes using the Internet for best performance and reliability.

Features

When browsing a vault, the PowerWeb window has these features:

Features of the PowerWeb window

Name	Description
Ribbon/menu bar	<p>Ribbon of Meridian commands. The commands listed on the various menus are the same as those on the shortcut menu. At the right end of the bar are a list for changing the current vault and an icon to log off.</p> <p>If the Show ribbon menus option is disabled as described in Personal Preferences, the menu bar appears below the context bar instead of the ribbon.</p>
Context bar	<p>On the left side, provides a quick search tool and lists for changing the navigation view and current scope. On the right side, provides icons to change your preferences, view this <i>User's Guide</i> in a browser window, and log off.</p> <p>If the Show ribbon menus option is enabled as described in Personal Preferences, the ribbon appears above this bar instead of the menu bar (5).</p>

Name	Description
Property page tabs	Click to display sets of related properties for the selected item. The quantity and names of property pages varies with the currently selected item or document type. If the document is a hybrid, a special Hybrid Parts property page tab appears at the right side that will show a list of the available hybrid parts for the selected document.
Document pane	<p>Displays the property pages for the selected item, if one is selected. Activate shortcut menus as described in Shortcut Menus.</p> <p>If no document or folder is selected, a General property page shows applicable information for the various types of views that are active in the navigation pane:</p> <ul style="list-style-type: none"> • Navigation views — shows a hierarchical view of the properties that define the selected branch and their values • Collection views — shows the collection search criteria, which can be changed to refine the collection • Search Results — shows the search criteria, which can be changed to refine the search
Navigation pane	One of various hierarchical views of the vault contents. Select another view from the list in the context bar. Activate shortcut menus as described in Shortcut Menus .
URLs	Addresses of the selected document and its rendition (if available) that you can copy to the Clipboard and paste in other documents or systems to create a link to the document.
View bar	Click an icon to show related read-only data in the document pane. The available views depend on the selected document from among: Document, View Document, View Rendition, Revisions, References, Master and Project Copies, Workflow Diagram, and Tags . Each view (except Document) can be undocked as a separate window.

PowerWeb hyperlinks are indicated by blue text. These allow you to open folders and the document log.

Differences between PowerWeb and PowerUser

PowerWeb is almost identical to PowerUser with these limitations:

PowerWeb compared to PowerUser

PowerUser	PowerWeb
Configurable window layout	Not supported

PowerUser	PowerWeb
Local PC document templates	Not supported
Thumbnail view	Planned
Assembly import tool	Packages
Briefcases	Packages
Email integration	Email Documents
History baselines	Not supported
Global Collaboration Framework support	Not supported
Saved search settings	Create And Edit a Collection
Unlock a master document that is the current document	Unlock a Master Document From the Project Copy
Expand all folders in navigation trees	Not supported
Some VBScript objects, properties, and methods	See the <i>VBScript and PowerWeb</i> article in the <i>Meridian Enterprise VBScript API Reference Guide</i> .
Automatic Inventor, SolidWorks, Revit, Office title block/property synchronization	Not supported
Not supported	Meridian Cloud Analytics property page for projects
Not supported	Workflow diagram accessibility and usability optimizations
Not supported	Open documents from within the assembly browser
Not supported	Unlink From Meridian Portal command.
Add unlisted values to Lookup List	Not supported

Log On

By default, Meridian Enterprise uses your Windows user account to automatically log you on. If enabled for a vault, the Meridian Enterprise FDA Module can provide an added level of security by prompting you to manually log on. This feature is configurable by a System Administrator and affects all Meridian Enterprise client applications.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To log on:

1. Open a shortcut provided to you by a System Administrator or enter the URL of the your Meridian server in your browser's address bar like:

```
<ServerName>/Meridian/Start
```

The vault selection page appears.

2. Click a vault name in the **Available Vaults** list.

PowerUser Procedures

Use these steps for [PowerUser](#).

To log on:

1. Double-click the PowerUser icon on your desktop or the Windows Start menu.



For information on starting PowerUser with optional command-line arguments, see [Command-Line Arguments](#).

If the Meridian Enterprise FDA Module authentication is enabled, instead of opening immediately, the **Open Vault** dialog box appears.

2. Type your user name and password in **User name** and **Password** and click **OK**.

Different results will occur depending on the outcome of the authentication:

- If the user name and password you typed are correct, and they match those of the user account currently logged on to the computer, the client application will open.
- If the user name or password is incorrect or if one of them does not match that of the user account currently logged on to the computer, an error message will display and the vault will not open. You will be specified another chance to log on. After an administrator-configured number of invalid logon attempts, Meridian will lock the computer until the correct credentials are typed.

All logon attempts (successful and unsuccessful) are logged to the Meridian audit log.

Personal Preferences

Although most aspects of PowerWeb behavior are controlled by a System Administrator, you can modify some options to suit your own preferences.

Use these steps for [PowerWeb](#).

Set Personal Preferences

To set your personal preferences:

1. Choose between two options:
 - In the context bar, click your name, and then click the **Preferences**.
 - Select **Preferences** from the **Miscellaneous** section of the document, folder, or selection shortcut menus.
The **Change Preferences** page appears.
2. Select options using the descriptions in the following table and click **OK**.

Reset Preferences to Default

To reset your personal preferences to their default settings:

1. Choose between two options:
 - In the context bar, click your name, and then click the **Preferences**.
 - Select **Preferences** from the **Miscellaneous** section of the document, folder, or selection shortcut menus.
The **Change Preferences** page appears.
2. Click **Reset Profile** at the bottom of the page.

Personal Preference Options

Personal preference options

Option	Description
Use Oracle AutoVue Client/Server deployment to view documents	Replaces the viewer with the AutoVue Client/Server (Java applet) viewer. Your organization must have an available AutoVue rendering server and AutoVue application server to use this option. Consult a System Administrator for the URLs to type for this option.
Site cache mode	<p>Select this option if a System Administrator has configured a site cache server for the users at your location and has given you the URL to enter as described in Configure Local Workspace.</p> <p>Meridian Application Integration must be installed on your PC. If any file conflicts occur with the local workspace copies, the errors will appear in the progress dialog box that is shown when the command runs.</p> <p>If you will work under a different account in the site cache server's domain or if the site cache server is behind a proxy server, configure the settings described in Configure a Site Cache Connection.</p> <p>Important! Do not work on the same document from more than one PC in Remote mode with this option enabled or document content inconsistencies can occur.</p> <p>If a user attempts to open a document where the version in the vault is newer than the version in their local workspace, PowerWeb and Application Integrations warn the user that the document may contain updates from other users, and that any local changes may be lost after synchronization. The user can then abort the operation.</p>

Option	Description
ActiveX compatibility mode	<p>Select this option if PowerWeb components are installed on your PC. This option and those shown by Document Transfer Options and Viewer Options are supported only on Internet Explorer.</p> <p>Click Document Transfer Options to set your personal preferences for downloading documents. Only available if Site cache mode is disabled, ActiveX compatibility mode is enabled, and the ActiveX components are installed on the PC.</p> <p>Click Viewer Options to set your personal preferences for the viewing window. For more information, see Change Viewers. Only available if ActiveX compatibility mode is enabled and the ActiveX components are installed on the PC.</p>
Workstation	<p>The name of the PC on which you are working. This is used to lock files that you modify to the PC and to prevent them from being overwritten by changes made at another PC. This is set automatically by default under most circumstances and cannot be changed.</p> <p>If this option is empty in your environment, enter the name of the PC on which you are working. If you typically work from multiple PCs, enter the name of the PC where you typically make changes and the documents will be locked to that PC.</p> <p>You cannot transfer documents that are currently locked from one PC to another. To make changes to documents that are currently locked to a different PC, first unlock them on that PC and then lock them on the other PC as described in Lock And Unlock Documents.</p>
View renditions	<p>Displays the rendition of the selected document instead of the source file when comparing documents and when viewing the full screen property window for revisions.</p>
View hotspots	<p>Whenever a document is viewed, hotspots are automatically displayed.</p>
Create thumbnails on import of document	<p>Generates thumbnail images of new documents you upload to the vault.</p>
Remember location in vault between sessions	<p>When you start a new PowerWeb session, opens the vault to the last document you viewed.</p>
Update thumbnails when releasing Quick Change	<p>Refreshes thumbnail images of documents you upload after making changes.</p>

Option	Description
Enable viewing the vault at a baseline or specific date or time	This option enables History mode , which allows you to select a specific point in the past and view the contents of the Vault. When you are viewing the vault in History mode, your documents are read-only.
Current time zone	Select your local time zone so that time data is displayed correctly.
Use custom color scheme	<p>Displays PowerWeb using an alternate color scheme. Select a scheme from the list.</p> <p>For information about customizing the available color schemes or creating new ones, see the <i>Create a Custom Color Scheme</i> article in the <i>Meridian Enterprise Configuration Guide</i>.</p>
Language	<p>Select your preferred language for the user interface text.</p> <p>Note:</p> <ul style="list-style-type: none"> • The selected language should match the specified Windows locale. • This setting does not currently affect the viewing window or the ActiveX download dialog.
Locale	Select your preferred locale for the format of dates and decimals in numbers. For more information about how this setting affects date formatting, see the <i>HKEY_LOCAL_MACHINE\Software\Cyco\AutoManager Meridian\CurrentVersion</i> article in the <i>Meridian Enterprise Administrator's Guide</i> .

Configure Browser Security

Because PowerWeb uses your Internet browser, the browser's security settings also affect PowerWeb. Depending on your organization's security policies, the version of Windows installed on your computer, and your permissions on the computer, the browser security settings might interfere with proper operation. This is particularly true for the default settings in newer versions of Windows. Following are the recommended security settings for Microsoft Internet Explorer for use with PowerWeb:

- Meridian vaults should be added as trusted sites
- Internet Explorer Protected Mode should be disabled

Use these steps for [PowerWeb](#).

To configure these Internet Explorer settings:

1. In Internet Explorer, on the **Tools** menu, select **Internet Options**.
The **Internet Options** dialog box appears.
2. Click the **Security** tab.
The security options appear.
3. Select the **Trusted sites** zone.
The zone's current security level is shown.
4. Click the **Sites** button.
The **Trusted sites** dialog box appears.
5. Type the address of the PowerWeb server, for example, **http://MyServer** and click **Add**.
The server is added to the **Websites** list.
6. Click **Close**.
7. Clear the **Enable Protected Mode** check box, if it is selected.
8. Click **OK**.

Read-Only PowerWeb Access

A System Administrator may give you read-only access to a vault through PowerWeb. This will let you see the results of a saved search. In this read-only mode, you are restricted to viewing documents and the properties shown in the **Folders** view. You cannot view or edit the property pages. If you have the appropriate privileges, you can download documents. You might also have the privilege to edit the shared collection search criteria to obtain different results.

Configure a Site Cache Connection

A site cache is a temporary storage location for frequently used documents. The site cache is located on a web server that is geographically closer to you than the Meridian Enterprise server from which the documents came. This improves performance when you work with the documents that are cached in the site cache. In certain cases, you must configure the connection parameters for the site cache before you can use it.

Meridian site caches support several types of user identities:

- User account logged on to PowerWeb. This is the default and you do not need to configure your account credentials.
- Foreign user account credentials provided to you by the vault owner.
- OpenId single sign-on account credentials

Normally, you work in Meridian under your own account – the account with which you logged on to Windows and your organization's security domain. There might be circumstances in which you need to work in Meridian using a different account, such as an account provided to you by the vault's owner, which can be a different organization with a separate security domain.

An example of such a circumstance is if you are contractor working for another organization. You log on to your own network and use PowerWeb but you need to access the other organization's vault with different account credentials that they provided to you. Meridian allows you to enter a different account name and password to connect to the vault while remaining logged on to your own Windows account and local security domain.

Note:

Working under a different account will create document copies in a new subfolder of the local workspace on your PC. By default, the local workspace folder is located at `C:\BC-WorkSpace`. The subfolder name will be the different account name, not your normal account name.

You must configure the connection parameters for the site cache if you will connect using:

- Foreign account credentials as described above
- OpenId account credentials that are also used for single sign-on to your Meridian Cloud account
- A proxy server with any account credentials



Note:

These tasks require that Meridian Application Integration is installed on your PC.

Use these steps for [PowerWeb](#).

Configure a Site Cache Connection

To configure a site cache connection:

1. Sign in to PowerWeb.
2. Set the **Site Cache URL** option for your local workspace to the URL of the vault owner's site cache server as described in [Configure Local Workspace](#).
3. Right-click the **Accruent Site Cache Log** icon  in the system tray and click **View Log**.
The **Accruent Site Cache Log** dialog box appears.
4. Click the down arrow next to the **Connect** toolbar button  and then click **Connection Settings** from the shortcut menu that appears.
The **Connection Settings** dialog box appears.
5. Click options or type values using the descriptions in the following table.
6. Click **OK**.
You are connected to the site cache.

Site cache connection options

Group	Option	Description
General	Use external authentication	Enable this option if your connection to the site cache server will be authenticated by the same OpenId authorization service that is used by your Meridian Cloud account.
General	Tenant Name	The name of your organization's Meridian Cloud account. The OpenId authentication provider information will be retrieved from Meridian Cloud and used by the local workspace client to connect to the site cache server.
General	User Name	Type the user name that was provided to you by the foreign vault's owner.
General	Password	Type the password that was provided to you by the foreign vault's owner.
General	Use workspace	When enabled, places temporary copies of documents in your normal local workspace just as if you were working in a vault in your own domain. When disabled, places temporary copies of documents in a separate local workspace folder with the name of the account specified for User Name .

Group	Option	Description
Proxy Settings	Proxy address	Type the URL of the proxy server through which to connect to the site cache server.
Proxy Settings	Proxy user name	Type the name of a user account that is authorized to connect to the proxy server.
Proxy Settings	Proxy user password	Type the password of the account specified for Proxy user name .
Proxy Settings	Save credentials	If enabled, the connection credentials are stored encrypted in the registry of the PC and are reused to connect the next browser session.


Resume Working in Your Network

To resume working in a vault in your own network with your own account:

1. Repeat step 2 in the procedures above and reset the **Site Cache URL** option for your local workspace to the URL of your organization's site cache server.
2. If you will be working in PowerWeb with external (OpenId) account credentials, clear your browser's cookies, which retain your previous connection info.
3. Repeat step 4 in the procedures above and but click **Logout**.


You will be logged out and the Meridian Cloud authentication page will appear to confirm this. After a few seconds, the login page will appear and you can enter your normal credentials.

Log Off

Doing this properly ends your current session and releases any licenses that you were using. Simply closing the browser tab by clicking the  icon or closing the browser will not immediately release any licenses you were using, which may prevent other users from using them.

Use these steps for [PowerWeb](#).

To log off:

- Click the **Log Off** icon  in the upper-right corner of the window.

PowerUser

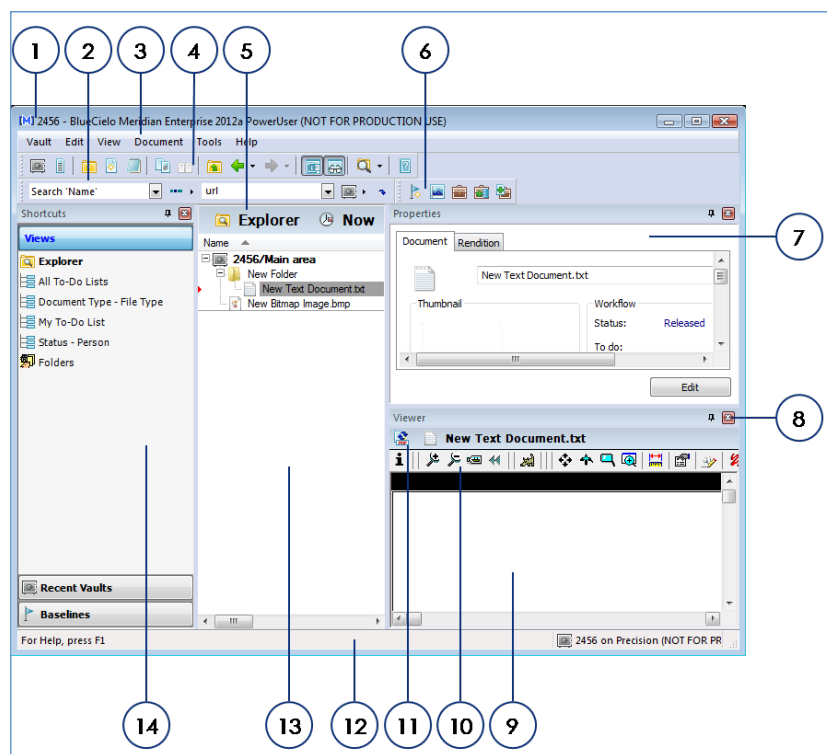
PowerUser is the legacy Windows desktop application for working with Meridian documents. It is designed for use by engineers, designers, and document controllers.

You can find topics that describe how to use PowerUser to perform common tasks throughout this guide.

Note:

Title block and reference synchronization is not supported in the 32-bit PowerUser.



The following figure identifies the various areas of the application window.



The following table describes each area of the application window.

Features of the Meridian Enterprise desktop application

Number	Name	Description
1	Title bar	Contains the name of the current vault.
2	Find toolbar	Common search tools. May be moved, docked, and hidden.

Number	Name	Description
3	Menu bar	Context-sensitive menus of Meridian Enterprise commands. May be moved and docked.
4	Main toolbar	Buttons for frequently used commands. May be moved, docked, and hidden.
5	Context bar	Buttons for changing the current scope, Navigation view, and time contexts. The button labels display the current selection of each.
6	Manager toolbar	Buttons for frequently used manager commands. May be moved, docked, and hidden.
7	Properties pane	Property values for the currently selected item. The number and names of property pages vary with the currently selected item. This pane may be hidden or shown by clicking the Show or hide properties button  . For more information see Property Pages .
8	Viewer Close button	Closes the viewer window. Click the Show or hide viewer button  on the Main toolbar to reopen the viewer window.
9	Viewer pane	Displays the contents of the selected document or its rendition. Double-click the viewer pane title bar to open the document in a new viewer window. Right-click the document name and select the Show Native or Show Rendition options to view the different document versions.
10	Viewer toolbar	Buttons for viewer tools. Different tools are available depending on the current file format and the current viewer.
11	Show native/rendition button	Click to toggle display in the viewer pane of the source document or its rendition. The button icon identifies the format of the rendition file.
12	Status bar	Displays the current vault name, time context, user name, and selected items count. Double-click the vault name, and time context to change them. Double-click the user name to view your user info such as group membership, Windows account names, and email addresses. This information may only be edited by a System Administrator.
13	Navigation view	One of various hierarchical views of the vault contents. Select another view from the Shortcuts pane or click the Navigation view button in the context bar. For information about manipulating Navigation views, see Configure a Navigation View .
14	Shortcuts pane	Buttons for easy access to Navigation views, saved searches, baselines, and recently opened vaults.

Log On

By default, Meridian Enterprise uses your Windows user account to automatically log you on. If enabled for a vault, the Meridian Enterprise FDA Module can provide an added level of security by prompting you to manually log on. This feature is configurable by a System Administrator and affects all Meridian Enterprise client applications.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To log on:

1. Open a shortcut provided to you by a System Administrator or enter the URL of the your Meridian server in your browser's address bar like:

```
<ServerName>/Meridian/Start
```

The vault selection page appears.

2. Click a vault name in the **Available Vaults** list.

PowerUser Procedures

Use these steps for [PowerUser](#).

To log on:

1. Double-click the PowerUser icon on your desktop or the Windows Start menu.



For information on starting PowerUser with optional command-line arguments, see [Command-Line Arguments](#).

If the Meridian Enterprise FDA Module authentication is enabled, instead of opening immediately, the **Open Vault** dialog box appears.

2. Type your user name and password in **User name** and **Password** and click **OK**.

Different results will occur depending on the outcome of the authentication:

- If the user name and password you typed are correct, and they match those of the user account currently logged on to the computer, the client application will open.
- If the user name or password is incorrect or if one of them does not match that of the user account currently logged on to the computer, an error message will display and the vault will not open. You will be specified another chance to log on. After an administrator-configured number of invalid logon attempts, Meridian will lock the computer until the correct credentials are typed.

All logon attempts (successful and unsuccessful) are logged to the Meridian audit log.

Personal Options

Options for the way documents, workflows, and views work are configured by a System Administrator. But you can configure many options for the way the Meridian client applications appear and work.

Use these steps for [PowerUser](#).

To set your personal options:

1. Click **Options** on the **View** menu.
The **Options** dialog box appears.
2. Select options on the tabs using the descriptions found in the following topics.

Arrange the Window Layout

The size, position, and visibility of several of the PowerUser window panes can be changed to suit your preferences:

- Shortcuts
- Properties
- Viewer

They can be individually moved, docked, and collapsed to any side of the PowerUser window, each other, or be dragged into position anywhere on the Windows desktop. This makes it easy to arrange the panes that you use the most to locations that are the most comfortable to you.

Use these steps for [PowerUser](#).

Make a Window Pane Docked or Floating

To make a window pane docked or floating:

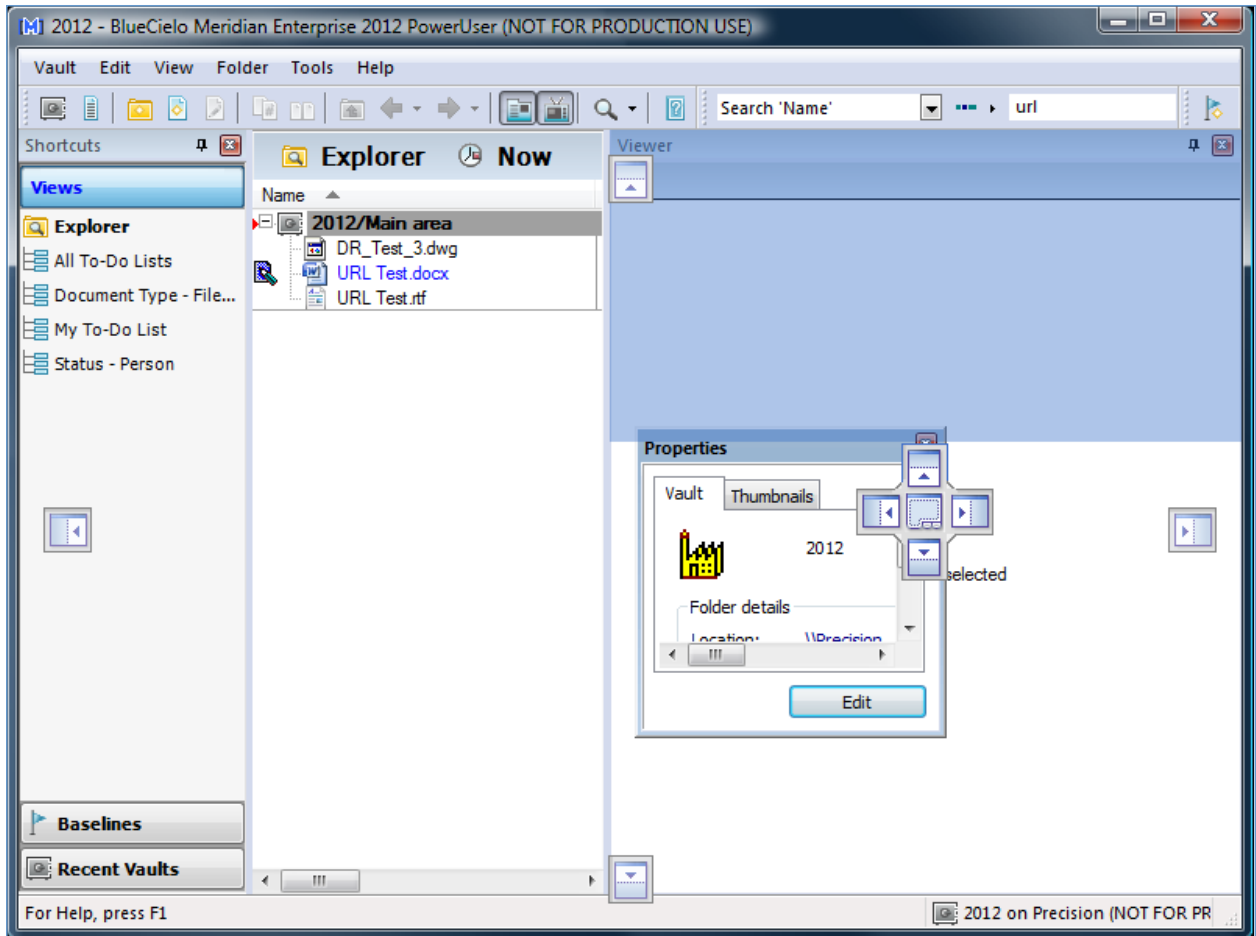
- Right-click a window pane and select **Docking** or **Floating**.


The window pane appears docked or floating, respectively. You may also drag a window pane to the Windows desktop to make it floating.

Move a Docked Pane to a Different Location

To move a docked pane to a different location within the PowerUser window:

1. Click and drag the title bar of the window pane that you want to move until docking guides appear, similar to the following figure.



- Drop the window pane onto the docking guide icon  nearest to the window edge where you want the pane to appear.

The area where the tab will be docked will appear shaded to help you select the correct position. To place the pane within the space occupied by another window pane, drop the pane onto a docking guide within the docking guide cluster shown in the following figure.

The docking guide cluster will apply the change to the window pane over which you hover your cursor.




When a window pane is docked, it may be automatically hidden when not in use by enabling its **Auto Hide** option.


Auto Hide Option of Window Panes

To enable or disable the **Auto Hide** option of a window pane:

- Right-click a window pane and enable **Auto Hide**.

The window pane collapses to the vertical edge of the window to which it is docked. You may also enable **Auto Hide** by clicking the pane's pin icon . To temporarily show a hidden window pane, hover your cursor over the pane's tab. The pane will automatically hide when your cursor is moved away from the pane.

- Right-click a window pane and disable **Auto Hide**.

The window pane anchors to the vertical edge of the window to which it is docked. You may also disable **Auto Hide** by clicking the pane's pin icon .

Reset Window Layout

To reset the window layout to its default arrangement:

- On the **View** menu, select **Reset Layout**.

The layout is restored to the default arrangement.

Configure the Application Look

The visual window style of the PowerUser window can be selected from among many common standards. The selected style is applied to the window regardless of the visual style used by the version of your computer's operating system.

Use these steps for [PowerUser](#).

To configure the application look:

- On the **View** menu, point to **Application Look**, and select a style from the sub-menu.
The window's style is changed to your selection.

General Options

The options on the **General** tab control startup. Most Meridian users prefer to enable both options in the **Startup** group. The following table lists the options and their descriptions.

General options

Option	Description
Remember last document between sessions	Remembers the last selected document when you reopen a vault. Note: The active view is not saved between vaults, so the document will be opened in the default view, if possible.
Remember last document between views	Remembers the last selected document when you change Navigation views.
I prefer online help	Shows online webhelp content in a web browser when you press F1 from within any Meridian client application.
I prefer local help	Shows local help content when you press F1 from within any Meridian client application.

Appearance Options

The options on the **Appearance** tab control redline display, Navigation view pane display, shortcut menu customization, and other options.

The following table lists the options and their descriptions.

Appearance options

Option	Description
Redline width	The width in pixels to display redlines in the viewer window. Values greater than 1 display redlines bolder than most other drawing entities except wide polylines. Click Viewer Options to set other options.
Show renditions by default	Enables the display of renditions in the viewer and shows them by default instead of the source document. Even if this option is cleared, renditions will be shown in the viewer by default if you have not been granted the View Content privilege.
Show grid lines	Displays horizontal grid lines between items in Navigation views, similar to a spreadsheet.
Column headers	Click Font to change the font used to display column headers.
Scope	Click Font to change the font used to display document property values.
Under change	Click the color swatch to select a different color for the property values of documents in workflows.
Shortcut menus	Click Configure to select commands to appear on the various shortcut menus.
Show user initials in status bar	Displays your initials in the status bar instead of your logon name.
Warn when opening a document in a read-only workflow state	Displays a warning message if you attempt to open a document that cannot be saved to the vault due to its current workflow status.

Actions Options

The options on the **Actions** tab control how Meridian reacts when you take certain actions.

The following table lists the options and their descriptions.

Actions options

Option	Description
Selecting a document refreshes the viewer pane	Select your preference: <ul style="list-style-type: none"> • Automatically — immediately displays the selected document • After clicking the Refresh button — displays the selected document only when you click Refresh This option is useful to improve the responsiveness of the Meridian client application and to reduce unnecessary network traffic
Double-clicking the viewer pane	Select your preference: <ul style="list-style-type: none"> • Expands the viewer to full screen — expands the viewer to full screen when you double-click the viewer window • Opens the document in its native application — opens the document in its native application when you double-click the viewer window • Does nothing — does nothing when you double-click the viewer window
Double-clicking a thumbnail	Select your preference: <ul style="list-style-type: none"> • Toggles the viewer pan visibility — toggles the viewer pan visibility when you double-click the document's thumbnail image • Expands the viewer to full-screen — expands the viewer to full-screen when you double-click the document's thumbnail image • Opens the document in its native application — opens the document in its native application when you double-click the document's thumbnail image • Refreshes the thumbnail — refreshes the thumbnail when you double-click the document's thumbnail image • Does nothing — does nothing when you double-click the document's thumbnail image

Advanced Options

The options on the **Advanced** tab control when thumbnail images are generated; various performance, viewer behavior, and warning messages; and miscellaneous options.

The following table lists the options and their descriptions.

Advanced options

Option	Description
After document import	Creates a new thumbnail image. Select this option to ensure that new documents display a thumbnail.
After releasing a Quick Change or submitting a working copy	Creates a new thumbnail image. Select this option to ensure that changed documents display an updated thumbnail.
After changing the document workflow state	Creates a new thumbnail image. Select this option to ensure that thumbnail images containing title blocks that are linked to vault data are updated.
Use existing preview image, if available	Displays the preview image embedded in certain files instead of creating a redundant image. Select this option to improve system responsiveness and save disk space.
Warn when a folder contains more documents than	Displays a warning message when expanding a folder or selecting another view might take longer than expected because it contains many documents. Limiting the number of documents per folder maintains system performance. The optimum number of documents per folder depends on the system configuration.
Maximum size of a tableview per call	Limits the amount of information that the Meridian client application requests from the server at one time. Optimizing this setting may improve system performance. The optimum size depends on network performance and the average number of items per folder.
Automatically refresh property pages	Causes Meridian to refresh the values shown on property pages automatically when you return to Meridian from other applications. Otherwise, the values are refreshed when a document is selected. Enable this option if critical property values are changed from within other applications, such as via title block links. Enabling this option may reduce system responsiveness.

Option	Description
Refresh the viewer pane with every document selected	<p>Causes Meridian to refresh the property values shown in Navigation views automatically every time you select another document. Otherwise, the values are refreshed when a view is opened.</p> <p>Enable this option if critical property values may be changed by other users. Enabling this option may reduce system responsiveness.</p>
Load Navigation view data on demand	<p>Causes Meridian to retrieve only the data for the number of items that can be shown in the current Navigation view, depending on its size. More data will be retrieved only when more items need to be shown.</p> <p>Enable this option to improve system performance, especially when folders contain fewer than 1,000 items.</p> <p>When this option is enabled, the column filters that are described in Configure a Navigation View are disabled.</p>
Threshold	<p>The number of records above which on-demand Navigation view loading will be used.</p> <p>Decrease this number to the approximate average number of items per folder.</p>
Suspend viewing the document	<p>Causes Meridian to release the document shown in the viewer to prevent conflicts when the document is opened in another application, such as by the Open in application command. Otherwise, Meridian keeps the document open in the viewer.</p> <p>This setting has no effect on AutoVue client/server deployments.</p>
When focus is returned, reopen document after (msec)	<p>The number of milliseconds for Meridian to wait before reopening a suspended document in the viewer. This allows other applications, such as those opened by the Open in Application command, to save and close the file before Meridian reopens it.</p>
Debug event script	<p>Enables the Script Debugger sub-menu on the Tools menu if a valid debugger is installed on the computer.</p>
Leave data on the Clipboard when opening another vault	<p>Enable this option if you want to paste documents between vaults.</p>

Command-Line Arguments

The Meridian Enterprise desktop client applications support command-line arguments that open the applications with either a specified object or the results of specified search criteria. You can use the command line to create desktop shortcuts or to run the startup search anywhere that a command line is accepted.

Use these steps for [PowerUser](#).

To use the command-line arguments:

1. Create a shortcut or open a command-line window.
2. Specify the path to the PowerUser executable.

For example, for 64-bit:

```
"C:\Program Files\BC-Meridian\Program\PowerUser.exe"
```

Or for 32-bit:

```
"C:\Program Files (x86)\BC-Meridian\Program\PowerUserU.exe"
```

3. Specify the command-line arguments using the descriptions in the following table.

Command-line arguments

Argument	Description
/AMFS	The vault in which to find the objects specified by the other command-line arguments. Use the following syntax: /AMFS=M-<ServerName>,D-<DatastoreName>,S-<VaultName> For example: /AMFS=M-EngServer,D-MyCompany,S-BigVault
/O	The ID of the object where you want to application to open. To specify the ID of a document, use its Document ID value. To specify the ID of a folder, use the Parent Folder ID value of a document or subfolder contained in the folder. If this argument is specified, do not specify the /DT or /PF arguments.
/DT	Document type search criteria specified as a list of the internal or display names of the documents types in which to search. For example: /DT="GenericDocument,Drawing,EmailDocType" This argument may be specified in combination with the /PF argument. If this argument is specified, do not specify the /O argument.

Argument	Description
/PF	<p>Property search criteria specified using the following syntax: <i>/PF=<PropertySet.PropertyName>,<PropertyValue>,<Operator></i></p> <p>For example: <i>/PF="Custom.DrawingNumber,D-09-12345,OP_STARTWITH"</i></p> <p>The Operator argument is specified as a shortened version of one of the IC_OPERATOR constants that can be found in the Constants branch of the Object Browser in the Meridian Enterprise VBScript Editor. The default is OP_EQUALS.</p> <p>This argument may be specified in combination with the /DT argument. If this argument is specified, do not specify the /O argument.</p>

An example of a complete command line that opens PowerUser and searches for documents of a specific document type and that have specific property values is:

```
"C:\Program Files\BC-Meridian\Program\PowerUser.exe" /AMFS=M-
PRECISION,D-TM,S-TM /DT=Submittal
/PF="AMDocumentWorkflowPropertySet.Status,Under Change,OP_EQUALS"
```

The preceding example would open PowerUser directly to a list of documents of the **Submittal** document type that have the value **Under Change** for the **Status** property.

The results of opening the vault with command line arguments will be shown in a view named **Startup Search**.



Application Integration

Application Integration is the name of the Meridian client components that provide:

- Batch document upload/download functionality in addition to single document transfers
- Site cache connectivity and local workspace management
- Links with standard Windows applications


It is optional for users who need the benefits above. Users who do not need those features do not need to install Application Integration. The components are installed by the **Application Integration** feature in the Meridian Enterprise client installation package as described in *Control Windows Installer Packages* in the *Meridian Enterprise Administrator's Guide*. Meridian Cloud users can install the components by downloading the Meridian Cloud Client installation package from the Meridian Cloud home page.

Application Integration is designed to help you find documents, open them for editing, save them, and route them in workflows all from within the applications where you create and edit documents. The Application Integration window looks and works very similar to PowerUser except that Application Integration:


- Has no menu bar
- Has only a single toolbar
- Has no shortcut bar
- Has no status bar
- Cannot display history
- Shows limited file and workflow status information in the properties pane. Click the **View or edit properties** button  on the toolbar to view or edit all properties.
- Shows a thumbnail in the viewer pane. Click the **View selected document** button  to open a new viewer window.
- Supports only the Quick Find search tools described in [Quick Find](#).

Otherwise, you can perform many of the same tasks with Application Integration that you can with PowerUser, but conveniently from within your favorite editing applications. Most tasks work the same from both Application Integration and PowerUser. For information on performing common document management tasks with Application Integration, see the topics elsewhere in this guide.

When Application Integration is installed on your computer and you select any commands such as **Open**, **Save**, or **Save As**, you will see one of two things:

- The Application Integration window.
- A standard Windows file dialog box with the Meridian vault button  in the toolbar. If you click the vault button, the **Application Integration** window appears.

Note:

Microsoft Word ignores any selection you make from the **Files of type** list in the Application Integration window. If you want to save a Word file as a different file type, select the file type from the **Save as type** list in the Word **Save As** dialog box first before you click on the Meridian vault button  in the toolbar to save the document in the vault.


The Application Integration window can be opened from within any application that uses standard Windows file browser dialogs (and can therefore display the vault button) for its commands.

Application Integration Options

Application Integration offers a number of options that you can configure to modify its behavior to suit your preferences.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To set Application Integration options:

1. Right-click the **Accruent Application Integration** icon  in the system tray.
A shortcut menu appears.
2. Click options or type values using the descriptions in the following table.

Application Integration options

Command	Description
About Accruent Application Integration	Displays information about the currently installed version.
Run on Startup	Causes Application Integration to always load automatically whenever Windows starts.
Set Default Context	Select which vault to use by default with Application Integration. For Meridian Cloud users, enter <code><CloudAccountName>.meridian360.com</code> .
Default Behavior	<p>Always Show Accruent Dialog — Skips showing the application's standard file dialog and immediately opens the Application Integration window. You can access the application's own file dialogs by clicking the application icon button in the Application Integration window. Select this option if you mostly work on vault documents.</p> <p>Always Show Standard File Dialog — Displays the standard file dialog with the Meridian vault icon in the toolbar so you can decide where to open and save files from. Select this option if you mostly work on documents that reside outside of a vault.</p>
Edit Exclusion List	<p>Allows you to select applications from which Application Integration should not be available.</p> <p>If there are multiple versions of the same program installed on your PC, they will all be excluded regardless of their paths.</p>
Show Accruent Dialog For	<p>Allows you to select applications that should only use Application Integration.</p> <p>If there are multiple versions of the same program installed on your PC, they will all be included regardless of their paths.</p>

Command	Description
Disable Accruent Application Integration	Disables the integration with all applications.
Mode	<p>Online: Normal mode for LAN operation.</p> <p>Remote — Enables the application links to work more efficiently over a WAN or from remote offices with modest network bandwidth. This mode require at least a full time Internet connection to the Meridian web server. For more information, see Application Links In Remote Mode.</p> <p>Offline — Uses the Internet to access the vault for only the most critical information and uses local workspace for the data you create. For information, see Offline Mode And Remote Mode.</p>
Local Workspace	Displays a sub-menu of commands for managing your local workspace. For more information, see Local Workspace .
Site Cache Log	Opens the site cache log for troubleshooting.

Reset Application Integration Dialog Boxes

If you open a file dialog in a Windows application that is unknown to Meridian, a Meridian dialog box will appear, prompting you to select whether the command you just executed opens files or saves files. This is a one-time-only request so that Meridian then understands the purpose of the dialog box. If you make an incorrect choice, the wrong Meridian application integration dialog box will appear and the same type of files cannot be opened from or saved in the vault, depending on which choice you made.

Use these steps for [PowerUser](#).

To reset your application integration dialog box choices:

1. Open the Windows Registry Editor and locate the following key:

```
HKEY_CURRENT_USER\Software\Cyco\AutoManager Meridian\Current  
Version\AM Hook\Contexts
```

2. Delete the registry key that corresponds to the application's executable, for example, ACAD.exe.

You may then choose correctly the next time you are prompted.

Offline Mode And Remote Mode

Application Integration can work in one of three modes: Online, Remote, or Offline. Online mode is appropriate if you are connected to your organization's local area network (LAN). It is the default and works as described in the rest of this guide.

Remote mode

Remote mode enables the application links to work more efficiently over a wide area network (WAN) or over the Internet (Meridian Cloud). Remote mode requires at least a full-time Internet connection to the Meridian web server.

Offline mode

Offline mode is specifically for users who have a low-bandwidth connection to the Meridian server and find online mode to be too slow. Offline mode causes Application Integration to use the Internet to access the vault for only the most critical information and to use local workspace for the data that you change or create. This means that, to work on vault documents, you must first download them to your local workspace. You can do this with either PowerUser or PowerWeb. Then you can work in Offline mode until your changes are sent back to the Meridian vault by local workspace synchronization.

Prepare To Work Offline

Before you can safely work on documents in Offline mode, you must first download them to your local workspace. The documents also need to be locked to prevent editing by others.

Application Integration must be in Online mode to prepare documents for working in Offline mode. You must have an active connection to the Meridian server to use PowerUser or an active connection to the Meridian web server to use PowerWeb. You must restart any authoring applications that use Meridian application links for the links to detect the correct mode.


PowerWeb Procedures

Use these steps for [PowerWeb](#).

To prepare to work offline:

1. In PowerWeb, select the documents you want to work with in Offline mode.
2. Choose between two options:
 - If you selected one document, on the **Document** menu, select **Download Document**.
 - If you selected multiple documents, on the **Selection** shortcut menu, select **Download Documents**.

The documents are downloaded to your local workspace.


3. Log off.
4. Right-click the **Accruent Application Integration** icon  in the system tray.
A shortcut menu appears.
5. Point to **Mode (Online)** and select **Offline**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To prepare to work offline:

1. In PowerUser, select the documents you want to work with in Offline mode.
2. On the **Document** menu, click **Lock Documents and Sync Workspace**.
The documents are locked and downloaded to your local workspace.
3. Close PowerUser.

4. Right-click the **Accruent Application Integration** icon  in the system tray.
A shortcut menu appears.
5. Point to **Mode (Online)** and select **Offline**.

Work Offline Or Remote

You work offline or remote from within your favorite editing applications just as if you were in Online mode by using Application Integration to select and save vault documents. One difference is that, before displaying the Application Integration window with a view of the vault, Application Integration prompts you to select a remote vault through PowerWeb, similar to the following figure.

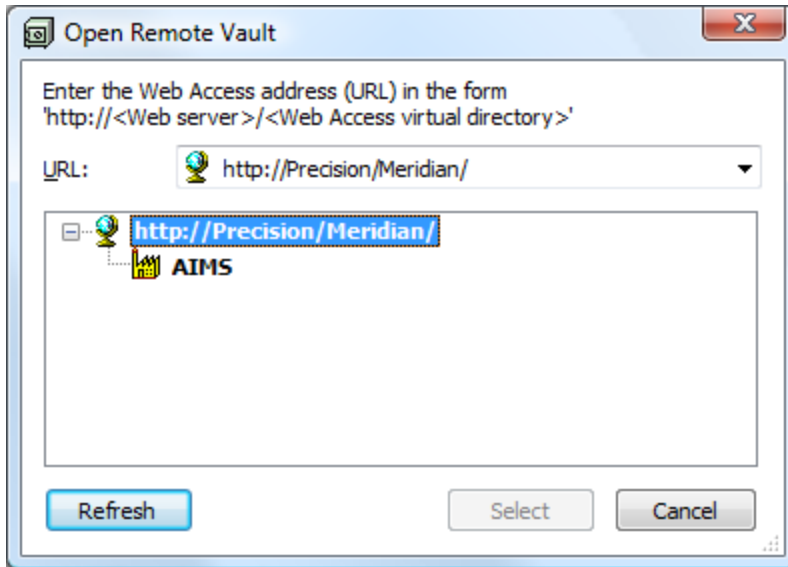
Note:

- You must have an active Internet connection to the PowerWeb server to work in Offline mode or Remote mode.
- Errors can occur if you download documents to your local workspace using 32-bit Internet Explorer as described in [Prepare To Work Offline](#) but later open the documents for editing in a 64-bit application. Always use either the 32-bit or 64-bit editions of Meridian components together, not a mixture of both.
- To synchronize the vault with your local changes, you must return to Online mode and either synchronize your local workspace manually or wait until the next automatic synchronization occurs.

Open a Remote Vault

To open a remote vault:

1. Click **Open**, **Save**, or **Save As** in your editing application.
The **Open Remote Vault** dialog box appears.
2. Type `http://<MyServer>/Meridian` where *<MyServer>* is the name of your organization's Meridian web server.
Do not use the PowerWeb URL.



Another difference is that the Application Integration dialogs show you the status of vault documents compared to the information stored on your computer that has not yet been synchronized with the vault. It shows you the status by the color of the document properties in the navigation views.

The meanings of the colors are described in the following table.

Offline mode colors

Option	Description
Black	The document is released and synchronized.
Blue	The document is checked out to you and synchronized
Red	The document is checked out to you but not yet synchronized with the vault.
Green	The vault does not contain any information about the document and is not yet synchronized. It is either new on your computer, deleted from the vault, or new in the vault but there is no offline information about the document on your computer.

Reference synchronization in Offline mode has certain constraints:

- Reference resolution is fully supported for the referenced documents that are cached in the same context in the local workspace. This includes resolution of existing references and creation of new outgoing references also cached in the local workspace in the same context.

- Cross-context reference resolution is also supported for existing references. Cross-context reference resolution is not supported for newly created references in Offline mode.


Switch Modes

Important!

Do not work on the same document from more than one PC in Remote mode with the **Use site cache** option enabled in your personal preferences or document content inconsistencies can occur.




Use these steps for [PowerUser](#) and [PowerWeb](#).

To switch modes:

1. Right-click the **Accruent Application Integration** icon  in the system tray.
A shortcut menu appears.
2. Point to **Mode (<CurrentMode>)** and select a different mode.

To help you recognize the current mode when you work with the Application Integration dialogs, an icon at the right end of the toolbar indicates the current mode. The icons are described in the following table.

Application Integration mode icons

Icon	Description
	Online mode. Not applicable to Meridian Cloud.
	Remote mode. Recommended for virtual private network (VPN) connections and Meridian Cloud.
	Offline mode. The dialog box title text reads Open from local cache of <Vault> on <LocalComputerName> .

Create New Documents

When in online mode or remote mode, the application integration detects files in the local workspace that do not exist in the vault and allows you to import them as new documents.

You can create documents in Offline mode by saving them in your local workspace instead of saving them in a vault. You can use any file name you want. When the local workspace is synchronized with the vault, the new documents are automatically uploaded to the vault.

Note:

To attach new parts to a hybrid document in Offline mode, the main document must exist in the vault and the new part must not already exist in the vault.

Local Workspace

Local workspace is the name of the area on your computer's hard disk where Meridian Enterprise copies vault documents when you view or edit them in a workflow. Meridian also copies all referenced documents to your local workspace and makes them read-only. This process is similar to the way web browsers cache web pages, images, and other content to improve performance. Local workspaces especially improve the performance of working with large files and assemblies. Unlike with a web browser, however, you can edit documents in your local workspace and even add new documents. The key to this ability is synchronization.

Synchronization

The local workspace is automatically synchronized with the vault by Application Integration while you continue to work. Meridian does the tedious job of keeping track of which files are newer, which files are under change and by whom, and which vault files should be updated from the local workspace copies. Vault synchronization can be configured to occur periodically or [you can run it manually, if needed](#).

The synchronization components are installed with the **Application Integration** feature by the Meridian Enterprise client installation package as described in *Install the Client Components* in the *Meridian Enterprise Administrator's Guide*. Meridian Cloud users can install the components by downloading the installation package from the Meridian Cloud home page.

Note:

The files that are synchronized to the vault are determined, in part, by the file filters that are configured for the vault by a System Administrator. If files with a particular extension are missing from the vault but are present in the local workspace, consult a System Administrator to see if they are being excluded by a file filter.

Open in Application

By default, all documents copied to local workspace are read-only. When you run the **Open in Application** command within one of the Meridian applications (or use Application Integration from within other applications), the local workspace copy is detected, made writable, and opened in the application. When synchronization occurs, any documents that have been changed and have been submitted or released in workflows are uploaded to replace the vault copies, and the local copy is set to read-only again.

Storage

Local workspace uses a limited amount of disk space. As more documents are downloaded and this limit is reached, the oldest documents that are read-only (and their parent folders, if empty) are automatically deleted until sufficient space is freed for newer documents. The least recently used files are deleted first. This disk cleanup happens in the background without your intervention. No documents that are being actively edited are deleted.

Notes About Storage

- If you download an updated revision of a document to your local workspace when you had previously downloaded an older revision, Meridian will create a new folder for the updated revision and append a unique identifier to the end of the folder name. Essentially, each folder is specific to the revision it contains.

As long as your changes have been saved in PowerWeb, it is safe to remove folders that contain prior revisions of the document from your local workspace.

- Some documents may reside in folders that are configured to use a shared network folder as a workspace instead of your local workspace. For information about working with documents in shared workspace folders, see [Shared Workspace Folders](#).
- When a document property is changed in PowerUser that causes the document to be moved in the vault, any local workspace copies are deleted during synchronization. This does not occur if the property is changed in PowerWeb, which might be contrary to your organization's file retention policy. If so, consider setting the **ForceClean** value in the following registry key:

```
HKEY_CURRENT_USER\Software\Cyco\AutoManager  
Meridian\CurrentVersion\AMSync\Settings
```

This registry key is documented in the *Meridian Enterprise Administrator's Guide*.

Configure Local Workspace

You can configure numerous options that control the way local workspace behaves. Depending on how your System Administrator has configured the **RemoteOnly** registry key setting for Meridian, you may not have access to all options. Learn more by reading the *HKEY_LOCAL_MACHINE\Software\Cyco\AutoManager Meridian\CurrentVersion* article in the *Meridian Enterprise Administrator's Guide*.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To configure your local workspace options:

1. Right-click the **Accruent Application Integration** icon  in the system tray, point to **Local Workspace**, and select **Options**.

The **Local Workspace Options** dialog box appears.

2. Select options using the descriptions in the following table and click **OK**.

Local workspace options

Page	Option	Description
General page	Enabled	Select this option to enable local workspace synchronization in the background while you work. If this option is cleared, changed and new documents will not be synchronized to the vault.
General page	Start synchronization every	The interval in minutes between synchronization attempts. Reduce this interval if other users need to see your changes sooner. Increase this interval if there are many users on the system or performance is low. The default is every 30 minutes. If you also want synchronization to occur at a specific time, at the beginning or end of your work day, for example, click Set Schedule and create a background task.
General page	Use in Offline and Remote modes	Enable this option to synchronize the vault while you continue to work in Offline or Remote mode.
General page	Synchronize recently accessed writable documents only	Skips synchronization of changed documents that are read-only, such as any documents that are still open in other applications that open documents in exclusive mode.
General page	Disk space on drive C:	The amount of disk space used, free, and used by local workspace.

Page	Option	Description
General page	Maximum amount of disk space to use for Local Workspace	The amount of disk space used for local workspace can affect system performance. The more documents that are stored there, the more documents Meridian Enterprise must compare against the vault copies. Set this option to the lowest size that retains the documents you are actively working on. The default is 750 MB.

Page	Option	Description
Site Cache page	Site Cache URL	<p>Important!</p> <p>Do not work on the same document from more than one PC in Remote mode with this option enabled or document content inconsistencies can occur.</p> <p>If you always use the same site cache, click Select manually and then type the URL of the site cache server for your location. If you do not know the URL, ask a System Administrator. If you use Meridian Cloud, enter <code>https://</code> <code><CloudAccountName></code> <code>/meridiancloud.net/BCSiteCache</code> and also set the Use external authentication and Tenant Name options described in Configure a Site Cache Connection.</p> <p>If you use more than one site cache (with a notebook PC at different geographical locations, for example):</p> <ol style="list-style-type: none"> 1. Click Select from list. 2. In Enter the Meridian web address (URL), type the URL of your nearest Meridian Enterprise web server. 3. Click Get Site Caches. The names of the site cache servers that are registered on the specified Meridian Enterprise web server are added to the drop-down list. 4. Select the desired site cache server from the drop-down list. The site cache server that your System Administrator has set as the optimum one for your current IP address will appear with the prefix Preferred:. The name is also set in the Select manually field so that the server will be automatically reconnected if the connection is dropped. 5. Click Apply. 6. Click OK. You connect to the new site cache server. <p>Also enable these options:</p> <ul style="list-style-type: none"> • Use in Offline Mode option above. • Set Application Integration to Remote mode as described in Work Offline Or Remote. • Site cache mode in PowerWeb as described in Personal Preferences.

Manually Synchronize the Local Workspace

You can manually synchronize the vault from your local workspace whenever necessary, such as after completing changes to an important document that needs somebody's immediate attention. You do not have to wait until the next automatic synchronization takes place.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

In the scenario where there are changes in both the vault and in the local workspace, the user will be prompted to choose the appropriate changes and resolve the merge conflict.

If the **Sync Workspace**, **Synchronize Now**, or **Lock Documents and Sync Workspace** commands are disabled, enable [Site Cache Mode in your preferences](#). This mode enables a communication channel between the server and the local client. To synchronize from the web interface, it is required that the server send a command to the local client via this channel.

Synchronize While Online

If you attempt to synchronize your local workspace when a document has a version in the vault newer than the version in your local workspace, the local workspace client warns you that the document may contain updates from other users, and that any local changes may be lost after synchronization. You can then abort the operation.

To manually synchronize while working in Online mode:


- Choose one of the following options:
 - On the **Edit** menu, in the **Workspace** group, select **Sync Workspace**.
 - To synchronize from the **Navigation** pane:
 1. Right-click your selection.
 2. Point to **Edit**.
 3. Select **Sync Workspace**.
 - From [the Thumbnails view](#):
 1. Right-click a thumbnail of a document.
 2. Point to **Edit** and then select **Sync Workspace**.

Synchronize While Offline

Important!

When using Offline mode, be sure to synchronize your local workspace before switching back to Online mode. Failing to do so can compromise the integrity of document references. In Offline mode, references are updated to local workspace locations. Synchronization corrects the reference location information so that the references will work correctly from within the vault.

To manually synchronize while working in Offline mode:

1. Right-click the **Accruent Application Integration** icon  in the system tray.
2. Point to **Local Workspace**.
3. Select **Synchronize Now**.

Lock Document and Sync Workspace

You can also choose to simultaneously lock documents and synchronize the workspace. This functionality prevents changes from being made by other users while the files are on your to-do list. It also ensures that your local files are up-to-date. You can then proceed to edit the contents of the documents.

To lock and synchronize one or more selected documents:

1. Choose between two options:
 - Select the **Search Results** heading.
This will apply the command you select to all results in your search, including results on subsequent pages.
 - Select the documents you want to lock and synchronize.
2. Choose one of the following options:
 - To take action from the **Edit** menu:
 - a. On the **Edit** menu, in the **Workspace** group, click the down arrow on the **Lock Document** command.
 - b. Select **Lock Documents and Sync Workspace**.
 - To take action from the Navigation pane:
 - a. Right-click your selection.
 - b. Point to **Edit**.
 - c. Point to **Lock Document**.
 - d. Select **Lock Documents and Sync Workspace**.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Select **Edit > Lock Document > Lock Documents and Sync Workspace**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To manually synchronize while working in Online mode:

- Choose between two options:
 - On the **Document** menu, select **Sync Workspace**.
 - To synchronize from the **Document** property page:
 1. Click the document icon on the **Document** property page.
The **Advanced Document Information** dialog box appears.
 2. Click the **Local Workspace** tab.
 3. Click **Synchronize**.

Lock And Unlock Documents

Documents are locked to prevent modification or copying under some circumstances, such as when they are added to a package. You can also manually lock a document to keep it in your local workspace if it is editable but not yet locked.

A document that is locked in another user's local workspace may need to be manually unlocked so that it can be edited elsewhere or by another user. This is especially useful if a user has to work on a different computer than where the document is currently locked. The document can be unlocked (and synchronized to the vault automatically) from the first computer; then the user can start working on the second computer, and the vault document (now up to date) will be copied to the second computer.

Note:

You must have the **Unlock from Briefcase** privilege to unlock documents that are locked to you or the **Unlock Document for Others** privilege to unlock documents that are locked to other users.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Lock a Document

To lock a document:

1. Select the document that you want to lock.
2. Choose one of the following options:
 - In the **Edit** ribbon, in the **Workspace** group, click **Lock Document**.
The **Lock Document** dialog box appears.
 - Right-click the document, then select **Edit > Lock Document > Lock Document**.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Edit > Lock Document > Lock Document**.
3. Click **Yes**.

The document is locked.

Unlock a Document

To unlock a document:

1. Select the document that you want to unlock.
2. Choose one of the following options:
 - In the **Edit** ribbon, in the **Workspace** group, click **Unlock Document** or **Unlock Another User's Document**.
The **Unlock Document** dialog box appears.
 - Right-click the document, then select **Edit** > **Lock Document** > **Unlock Document** or **Unlock Another User's Document**.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Edit** > **Lock Document** > **Unlock Document** or **Unlock Another User's Document**.
3. Click **Yes**.

The document is unlocked.

Unlock a Batch of Documents

To unlock a batch of documents:

1. [Conduct a search](#).
2. Select the **Search Results** heading.
This will apply the command you select to all results in your search, including results on subsequent pages.
3. Select the **Unlock Document** command on the **Edit** tab.
If the **Unlock** command is applicable for all files in the search results, the operation succeeds. Otherwise, the system executes the **Unlock** command for the files where the command is applicable.

[Lock Documents and Synchronize Workspace](#)

PowerUser Procedures

Use these steps for [PowerUser](#).

Lock a Document

To lock a document:

1. Click the document icon on the **Document** property page.
The **Advanced Document Information** dialog box appears.
2. Click the **Local Workspace** tab.
3. Click **Lock**.
The document is locked.


Unlock a Document

To unlock a document:

1. Click the document icon on the **Document** property page.
The **Advanced Document Information** dialog box appears.
2. Click the **Local Workspace** tab.
3. Click **Unlock**.
The document is unlocked. To unlock a document that is locked in another user's local workspace, consult a System Administrator.

Resolve Local Workspace Conflicts

A local workspace conflict occurs when there is a discrepancy between the local workspace copy of a document and the version in the vault. This most often happens when a new document is manually added to the local workspace. It can also happen if a local workspace copy is modified without using Meridian in any way, such as with the **Open in Application** command or with Application Integration. When conflicts occur, Meridian needs you to decide how to resolve them.

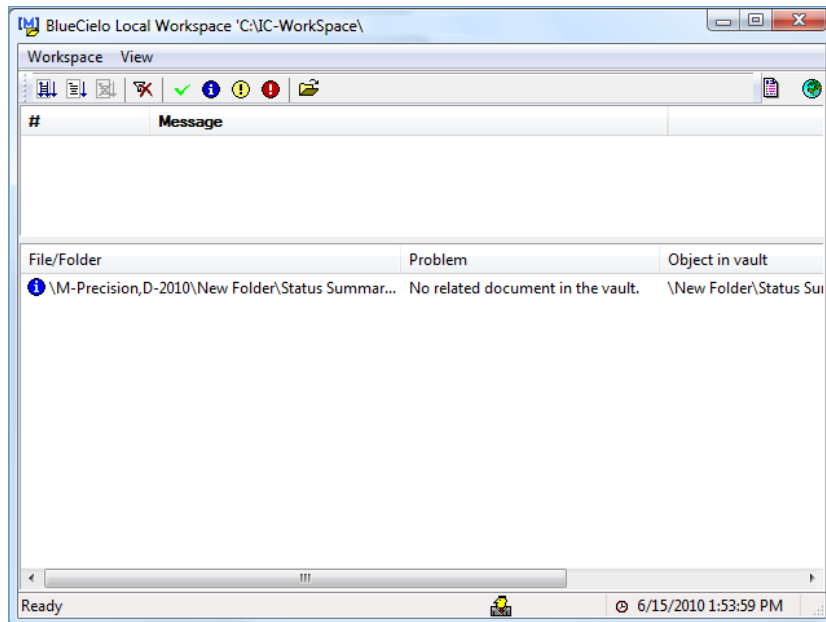
If the local workspace locked copy is newer than the unlocked vault copy, the value of the **Local copy** property on the **Document** property page is displayed in red. When synchronization takes place, the conflict is displayed as a balloon in the system tray, and the **Accruent Application Integration** icon  in the system tray flashes.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To resolve the conflict:

1. Right-click the **Accruent Application Integration** icon in the system tray.
2. Point to **Local Workspace** and click **View Log**.

The **Accruent Local Workspace** dialog box appears, similar to the following figure.



3. Right-click the conflicting document in the lower pane and select an option from the shortcut menu.

The following table describes each option.

Local workspace conflict resolution options

Command	Description
Compare	Displays the differences between the local workspace and vault copies so that you can choose which revision of the document to keep.
Delete from Workspace	Removes the local workspace copy.
Import	Imports the local workspace document into the vault.
Open Parent Folder	Opens the local workspace subfolder that contains the conflicting document.
Remove	Clears the error message from the log. If the conflict persists, the error message will reappear.
Remove All	Clears all error messages from the log. If the conflicts persist, the error messages will reappear.
Update Local Workspace from vault	Overwrites the local workspace copy from the vault. All changes made to the local workspace copy of the document are lost and the read-only attribute is reapplied.
Update vault from Local Workspace	Uploads the local workspace document to the vault. You can update the vault copy only if you are the current To-Do person.
View	Displays the local workspace copy of the document in a new viewer window.

Add Documents to Local Workspace

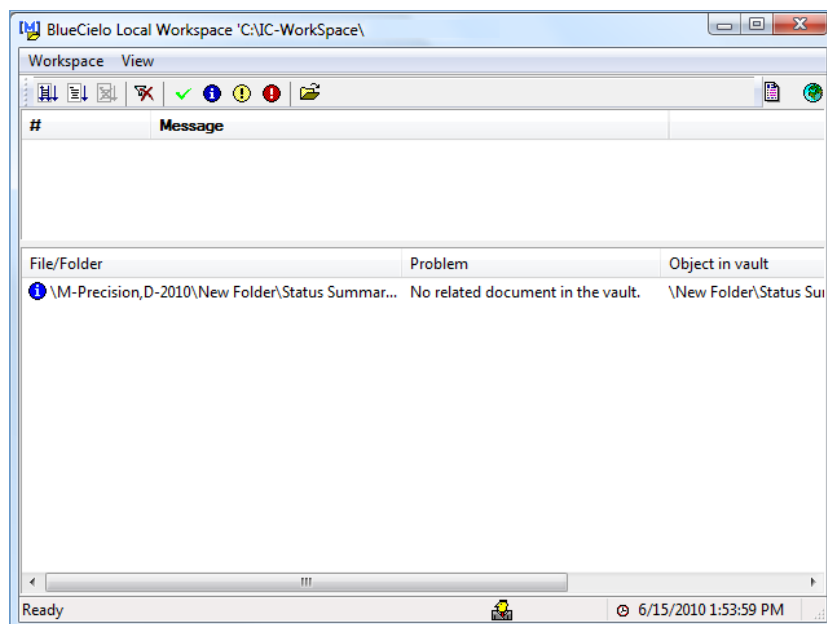
We recommend you use the Site Cache Client to upload large documents to your local workspace. The Site Cache Client chunks large files and communicates with the server directly, which allows for a faster upload. PowerWeb cannot chunk files, and as a result, large uploads lead to performance issues while PowerWeb communicates with IIS.


This functionality was added in the 2022 release of Meridian Enterprise, and in the 2022.3 version of Cloud.

To add documents via the Site Cache Client:

1. Right-click the **Accruent Application Integration** icon in the system tray.
2. Point to **Local Workspace** and click **View Log**.

The **Accruent Local Workspace** dialog box appears, similar to the following figure.



3. Click the **Add Document** button  in the toolbar.
The **Add Document / Select Files** window opens.
 4. Select the vault you want to add the document to.
 5. Select the folder you want to add the document to.
 6. Choose between two options:
 - Drag and drop the files you want to add into the **Add Document / Select Files** window.
- [There is a known issue in the 2022 release](#) that prevents this option from working when using the 32-bit application integration.

- Click **Add** and select the files you want to import.

The files you added appear in the **Add Document / Select Files** window.

7. If you want to synchronize your references from the files after the upload is complete, select the check box.
8. Click **Import**.












Local Workspace Log Toolbar Details

The local workspace log window features a toolbar similar to the following figure.



The following table describes each button.

Local workspace log toolbar buttons

Button	Command	Description
	Sync All in Local Workspace	Synchronizes all documents in local workspace with the vault regardless of their status. This can take a long time depending on the speed of your connection to the Meridian server and the size of your local workspace.
	Sync Recently Accessed	Only synchronizes documents in the local workspace that have been modified since the last synchronization.
	Stop Sync	Stops the current synchronization process.
	Clear Log	Clears all conflict messages from the log.
	Trace success	Display only messages of successful synchronization. These will be indicated with a green checkmark icon.
	Trace information	Display only information messages. These are indicated with a blue i icon. For example, when you have saved a document directly to the local workspace, the error message will be “No related document in the vault.”
	Trace warnings	Display warning messages. These are shown with the yellow ! icon. For example, if you have tried to bypass the system by manually removing the read-only flag on the document in the local workspace and then you edit it, you will see the message, “This file is modified outside of the vault.”
	Trace errors	Display only error messages. These are shown with the red ! icon.
	Open Local Workspace	Opens the local workspace folder in Windows Explorer.
	Add Document	Opens the Add Document / Select Files window .
		Indicates synchronization activity between the vault and local workspace.

Searches


Besides using Navigation views, Meridian Enterprise offers you multiple search methods for finding documents that are described in the following table.

Search methods

To do this...	Use this...
Quickly search a single property for values that start with certain text.	Key Find from a property page
<p>Quickly search a single property value using more conditions than available with Key Find or to quickly search memo or the contents of documents.</p> <p>Meridian uses the Windows Search engine to find text in document content. By default, it will search in open standard file types such as .txt and .xml, as well as the Microsoft Office file types such as .docx, .xlsx, .pptx, and so on. Image file formats cannot be searched without first processing them with optical character recognition (OCR) software. Files without name extensions can only be found by property searches, not by content searches.</p> <p>Your System Administrator can add support for more file types, for example, .pdf (including renditions), .dwg, .idw, .sldrw, and .dgn. Meridian also searches the redline comments created by AutoVue in renditions.</p>	Quick Search from the toolbar
Search any properties, use the most conditions, search multiple vaults, or save the results for future reference and share them with other users.	Find from the toolbar or ribbon
Create shortcuts that open PowerUser and immediately run a simple search and display the results.	See Command-Line Arguments .


All Meridian Enterprise search methods are case-insensitive. Searches are limited to the current scope.

Key Find

Key Find is the simplest of the Meridian PowerUser search methods. A System Administrator can designate especially important properties in a vault as Key Find properties. Key Find properties are typically those that get searched frequently and store a different value for every document in a vault. Key Find properties can be identified on property pages by the **Key Find** icon  to the right of the property value.

Use these steps for [PowerUser](#).

To perform a Key Find search on a property:

1. Click the **Key Find** icon  to the right of the property you want to search.
The **Key Find** dialog box appears. The search property defaults to the property nearby the icon that you clicked. The search value defaults to the value of that property for the selected document. The search condition is always **Starts with** and cannot be changed.
2. Select a different property from **Property** or accept the default.
Only properties designated by a System Administrator as Key Find properties appear in the list.
3. Type a different search value or accept the default and click **Find Now**.
If any documents are found, the dialog expands to list the results. Only the first 250 documents appear in the list.
4. Click **250 More** to view additional documents.
5. Double-click a document or select a document and click **Go to** to make the selected document the selected document.

Although Key Find is easy to use, there are several common actions that you cannot do with Key Find:

- You cannot save or share the results of a Key Find search.
- You cannot view additional properties.
- You cannot view the document in a viewer window.
- The **Document** shortcut menu is not available in the **Key Find** window.
- You cannot run a report on the results of a Key Find search.

To perform these actions and others, use one of the more advanced search methods.

Quick Find

Quick Find is a more advanced search method than Key Find but simpler than **Find**.


PowerWeb Procedures

Use these steps for [PowerWeb](#).

Note:

- By default, Quick Find does not search in the document content (full-text) unless configured to do so by a System Administrator.
- Your search criterion is saved for the current session only and is reset to the default after you log off.

To search using **Quick Find**:

1. In the toolbar, click the down arrow next to the search icon  and select the property that you want to search.

The properties listed are those designated by a System Administrator as **Key Find** properties.

2. Type the text that you want to find in the text box.
3. Click the icon or press **Enter**.

The **Search Results** view appears.

PowerUser Procedures

Use these steps for [PowerUser](#).

To search using Quick Find, use the lists on the toolbar as follows:

1. Select a property or option to search.

The properties listed are those designated by a System Administrator as Key Find properties. Besides the Key Find properties, the following options may be selected:

- **Name** — The **Name** (document name) property is available by default.
- **Document Content** — Searches for text that is contained within a document.
- **Memo Content** — Searches for text that is contained in memo type properties.

- **Text and Memo Content** — Search for text contained within any text type or memo type properties.
- **Text and All Content** — Searches all of the above: text properties, document content, and memo properties.

Note:

The **exact match** and **fuzzy search** options for document content and memo content determine how substrings in text are detected. They can be important for finding, for example, the same date formatted for different locales (1-2-2013 vs. 2-1-2013) or a document, tag, or part number that contains punctuation characters (71-3810.10).

2. Select a search operator:

- **Equals** — The search property must match the search value.
- **Contains** — The search property must contain the search value
- **Starts with** — The search property must start with the search value.
- **Contains multiple words** (separate words with a space) — The search property must contain all of the search values.

3. Specify one of the following search terms:

- If the property uses a lookup list, a value from the text box list.
- A previous search term. PowerUser remembers the last 10 search terms.

Note:

To clear the search value list, right-click the text box and select **Clear Search History**.

- Type all or part of the text that you want to search for in the text box.

4. Select a search context:

- **This Vault.**
- **All Vaults** — Includes all vaults on the same Meridian server as the current vault. This option is not available if a scope is active.

5. Click the **Execute Search** button or press **Enter** to start the search.

If the search is successful, the Navigation view automatically changes to **Find Results** with the found documents listed. The **Find Results** view can be configured and filtered the same as other views as described in [Configure a Navigation View](#). If the search is unsuccessful, an information dialog box appears.

Click **OK** to stop searching.

Click **Cancel** to modify the search parameters and try again.

Note:

The **Run Search** button is cleared when a search condition is selected that is not valid for the current search property or option. The following table indicates the valid conditions for each property type or search option.

Supported search conditions

Search Type	Equals	Contains	Starts With	Contains Multiple Words
Name	Supported	Supported	Supported	Supported
Key Find properties	Supported	Supported	Supported	Supported
Document Content	Not Supported	Supported	Not Supported	Supported
Text and Memo Content	Not Supported	Supported	Not Supported	Supported
Text and All Content	Not Supported	Supported	Not Supported	Supported

If you select the search context **All Vaults** and your search is successful, the results are shown in a new window instead of in the **Find Results** navigation view. Select a document and click **Details** to show the thumbnail and a limited number of properties for the selected document. If you select a document that resides in a different vault and either click the **Go To** button or double-click the document, a new PowerUser window opens and the document you selected is made the selected document.

Find

Find is the most advanced search method in Meridian; it can find either documents or folders. It gives you complete flexibility of the search scope, properties, and conditions. **Find** can include referenced documents in its results and its results can be saved and shared with other users.

PowerWeb Procedures

Use these steps for [PowerWeb](#).


Find Documents

To find documents:

1. Choose one of the following options:

- In the **Search** ribbon, in the **Find** group, click **Find** or **Find in This Folder**.

The **Find Documents** dialog box appears.

Find allows you to specify the scope of your search as multiple vaults, the current vault or a specified folder. **Find in This Folder** limits the scope of your search to the selected folder as indicated by this icon , which is not necessarily the folder containing the highlighted document. They can be different.

- Right-click the folder, point to **Search**, and then select **Find** or **Find in This Folder**.

- From [the Thumbnails view](#):

- a. Right-click a thumbnail of a folder or document.
- b. Point to **Search**, and then select **Find** or **Find in This Folder**.

2. If you chose **Find** in step 1, choose between three options:

- Select **Entire Vault** if you want to search the entire vault.
- If you want to search a folder:
 - a. Select **This folder**.
 - b. Select the folder you want to search.
 - c. If you want to include sub-folders in your search, select the **and subfolders** check box.
- If you want to search a collection:

- a. Select **This collection**.
 - b. Select the collection you want to search.
3. On the **Search** tab, type all or part of the document name in **Name**.

The wildcard characters ? (any single character) and * (any string of characters) are accepted. The effective search criteria will be the combination of the **Name** criterion and the criteria in the **Current criteria** list.

The default criteria in the **Current criteria** list are properties configured by a System Administrator and criteria that you have used recently.
4. Choose between two options:
 - Select any of the default criteria that you want included in the search.
 - Click **Reset**.
5. To add a criterion to the list:
 - a. Select an option from **Property**.

The properties available in this list depend on the vault's configuration and your security privileges.
 - b. Select a search condition from **Condition**.
 - c. Type your desired search text in **Value**.
 - d. Click **Add to List**.
 - e. Repeat steps a to d to add more criteria.
 - f. Choose between two options:
 - Use the default search operator, OR.
 - Select **All these criteria must be met** to combine all the selected criteria (AND operator).
6. If you clicked **Find** to search in multiple vaults:
 - a. Select **Selected vaults**.
 - b. On the **Vaults** tab, select the vaults to search in the right column.
 - c. Click the left arrow button to add them to the left column.
7. To search in only specific document types, select them on the **Document Types** tab as described in [Document Types Options](#).
8. To include documents that are related by Meridian references to your search results, select options on the **References** tab as described in [References Options](#).
9. Click **Find Now** to run the search.

The **Search results** page appears.
10. To reset all your search criteria and start a new search, click **Reset**.

Find Folders

To find folders:

1. Choose one of the following options:

- In the **Search** ribbon, click **Find Folders**.

The **Find Folders** dialog box appears.

The default folder search scope is the entire current vault.

- To limit the scope to a specific folder, select **This folder** and type its name.
- To search recursively through its subfolders, enable **and subfolders**.

- Right-click the folder, point to **Search**, and then select **Find Folders**.

- From [the Thumbnails view](#):

- a. Right-click a thumbnail of a folder or document.
- b. Point to **Search**, and then select **Find Folders**.

2. On the **Search** tab, type all or part of the folder name in **Name**.

The wildcard characters ? (any single character) and * (any string of characters) are accepted. The effective search criteria will be the combination of the **Name** criterion and the criteria in **Current criteria** list.

The default criteria in the **Current criteria** list are properties configured by a System Administrator and criteria that you have used recently.

3. Choose between two options:

- Select any of the default criteria that you want included in the search.
- Click **Reset**.

4. To add a criterion to the list:

- a. Select an option from **Property**.
- b. Select a search condition from **Condition**.
- c. Type your desired search text in **Value**.
- d. Click **Add to List**.
- e. Repeat steps a to d to add more criteria.
- f. Choose between two options:
 - Use the default search operator, **OR**.
 - Select **All these criteria must be met** to combine all the selected criteria (**AND** operator).


5. To search in only specific folder types, select them on the **Folder Types** tab.

6. Click **Find Now** to run the search.
The **Search results** page appears.
7. To reset all your search criteria and start a new search, click **Reset**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To use **Find**:

1. Choose one of the following options:
 - On the **Edit** menu, select **Find**.
 - Click the downward pointing arrow next to the **Find** button  on the Main toolbar and then select **Find documents** or **Find folders**.
The command that you choose then becomes the default button in the toolbar.
 - Press Ctrl+F.
 - On the shortcut menu of a folder within which you want to search, select **Find**.

The **Find Documents** or the **Find Folders** dialog box opens, depending on which method you used to start the command. If you selected **Find** on a folder shortcut menu, search criteria are automatically typed in the dialog for you. The criteria match the contents of the folder where you started the search.

Note:

Depending on the value of **KeepSearchSettings** in the following registry key, your previous search settings are restored.

```
HKEY_CURRENT_USER\Software\Cyco\AutoManager  
Meridian\CurrentVersion\AMFind\Settings
```

2. Click options and type text using the descriptions in the following topics.
3. After you have configured the search options that you want, click **Find Now**.
If the search is successful, the dialog expands to list the results. Only the first 250 items appear in the list.
4. Click **250 More** to view additional items.
5. Select an item and click **Details** to show the thumbnail and a limited number of properties for the selected item.
6. Double-click the thumbnail to open the selected document in a new viewer window.
7. Double-click the property page to open a new **Properties** dialog box that shows all of the item's property pages for viewing or editing.

8. Click the **Go To** button or double-click the item to close the dialog and to make the selected item the current item.
9. Click **New Search** to clear all selections and reset the dialog to its default settings, ready to begin a new search.
10. Click **Save** or **Save As** to save the current results as a collection.
For details, see [Create And Edit a Collection](#).
11. Click **Close**.

What & Where Options

The **What & Where** tab in the PowerUser determine the item names and locations that will appear in the search results. The following table describes these options.

What & Where options

Option	Description
Document name or Folder name	Type some or all of the item name that you want to find. The wildcard characters ? (any single character) and * (any string of characters) are accepted.
This vault	Searches only the current vault.
This folder	Click the Select Folder icon to select a folder within which to limit the search. Select and sub-folders to also search with the sub-folders of the selected folder.
This collection	Searches only within the selected collection. The existing static and dynamic collections are listed.
All vaults	Searches in all vaults that reside on the same server as the current vault. This option is not available if a scope is active. Not available in PowerWeb.
Selected vaults	Click Change to select specific vaults to search. Not available in PowerWeb.

More Criteria Options

The **More Criteria** tab options in the PowerUser determine which property values the search results must match. The following table describes these options.

Note:

Meridian supports partial word searches on document content or memo content (full text search).

More Criteria options

Option	Description
All of these criteria	Search results must match all of the listed criteria. Also known as an AND search.
Any of these criteria	Search results can match any of the listed criteria. Also known as an OR search.
Property	<p>Double-click an empty cell in the Property column or click Add to display a list of search properties and options from which to select. The list includes the names of properties designated as Key Find properties.</p> <p>To select other properties, enable List all properties.</p> <p>Click Remove to remove a criterion. Click Remove All to start over.</p> <p>The exact match and fuzzy search options for document content and memo content determine how substrings in text are detected. They can be important for finding, for example, the same date formatted for different locales (1-2-2013 vs. 2-1-2013) or a document, tag, or part number that contains punctuation characters (71-3810.10).</p> <p>Routed properties (properties inherited from parent objects) are shown in the list as <i><FolderType>:<PropertyDefinition>.<PropertySet></i>.</p>
Condition	Select an appropriate condition from the list. The conditions listed are those valid for the data type of the selected property.

Option	Description
Value	<p>Type a value to search for. Only values valid for the data type of the selected property are allowed.</p> <p>Partial word searches are supported for document content or memo content (full text search). For example, searching for “ship” will find “ship” or “ships” or “shipyard.”</p> <p>Note:</p> <p>If a date type property is selected, the Value can be specified either by selecting a date from the calendar (default) or by entering an expression.</p> <p>To type an expression, right-click the current value, select Type date expression and type the expression. The expression can use the %CURRENTDATE% variable to calculate acceptable dates. The variable supports addition and subtraction operations.</p> <p>For example, %CURRENTDATE% + 10 will include property values for the next ten days.</p> <p>If the selected property is associated with a lookup list, the Value text box becomes a list from which you can select a lookup list value so that you do not need to know the precise value to type.</p>
List all properties	<p>Enable this option to include all property names in the Property list.</p>

Document Types Options

The **Document Types** tab allows you to select the document types to which to restrict document searches.

The **Folder Types** tab allows you to select the folder types to which to restrict folder searches. The **Exclude regular folders from search results** option limits the search results to include only folders created from folder type definitions.

References Options

The **References** tab options determine which documents that are related to documents in the search results will also appear in the search results. The **References** tab is only available for document searches. The following table describes these options.

References options

Option	Description
Include documents by reference	Includes documents by reference in the search results.
Include documents referenced by the found documents	Includes only documents that are referenced by (outgoing references) documents in the search results.
Include documents that reference the found documents	Includes only documents that reference (incoming references) documents in the search results.
Include both	Includes all documents with references to documents in the search results.
Recursively	Includes all documents contiguously associated by any type of references.
Restrict to the following reference type	Includes only documents with references of the selected type.
Include drawing and presentation files	Includes Autodesk Inventor drawing and presentation files in the search results.
Include hybrid parts in search results	Includes hybrid parts in the search results.

Search Settings Options

The **Search Settings** tab in the PowerUser let you save and load the search settings on all of the tabs in the **Find** dialog box. This can be useful to reuse and share complicated searches. The following table describes these options.

Note:

By default, your previous search settings are reloaded automatically. To disable this feature, see the note about the **KeepSearchSettings** registry value in [Find](#).

Search Settings options

Option	Description
Load	Click to load previously saved search settings.
Save	Click to save the current search settings with a name that you specify.
Delete	Click to delete the selected search settings.

Collections

A Meridian collection is a set of documents that can be created for various purposes, reused, edited, and optionally shared with other users. Meridian allows you to save the results of a **Find** search as a collection. You can then use the collection with most commands such as **Build Report**, **Draft Print**, and workflow transitions.

Note:

- Only the **Find** search method supports saving searches as collections.
- A search that includes results from other vaults cannot be saved as a collection.

Collections can be of two types:

- **Static** — A saved list of document names. A static collection can be created as a new, empty list or with the results of a search. Individual documents can then be manually added to the collection and selected documents removed from the collection. New documents that are created and that also match the search criteria are not automatically added to the collection.

Every Meridian user has a permanent, personal static collection named **My Search Results** that can be reused and to which the results of other searches can be added.

- **Dynamic** — Saved search criteria, not the search results, are saved and then re-evaluated when you or others view the collection. New documents that are created and that also match the search criteria are automatically added to the collection. Non-matching documents cannot be manually added to the collection.

A dynamic collection can be shared with other users, used as the scope for System Administrator-defined reports, and used as a starting page for read-only PowerWeb users.

View a Collection

Collections appear as a view in the **View** list, similar to navigation views.

Collection views can be filtered and manipulated like other Navigation views as described in [Configure a Navigation View](#).

Note:

Collections created in a different time zone and based on search criteria that include a literal date comparison may show unexpected results. This is because of the difference in time zones between where the collection was created and where it is viewed. Date comparisons that use variables like **%CURRENTDATE%** are not affected.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

View a Collection

To view a collection:

- In the view list, click the name of the collection that you want to view.
The collection contents appear in the navigation view pane.


Note:

When the collection is configured as described in [Configure a Dynamic Collection](#) and the **Allow user to edit the condition and value** option and the **Make this query available to PowerWeb users** option are enabled, you might see different results in PowerWeb than in PowerUser when you initially view this collection. This is because it is assumed that you will edit the search criteria first before running the search. Criteria other than the properties and name (for example, folder and object type filters) are ignored when the collection is first shown.

Sort Documents in Collection Based on a Column

To sort the documents in a collection based on a particular column:

1. Click the column heading that you want to sort on.

An arrowhead icon  in the column heading indicates the current sorting column and sort

order.

2. Click the column heading again to reverse the sort order.

PowerUser Procedures

Use these steps for [PowerUser](#).

To view a collection:

- Choose between two options:
 - In the context bar, click the view button and then click the name of the collection that you want to view.
The collection contents appear in the Navigation view pane.
 - On the **View** menu, point to **Change View**, and click the name of the collection that you want to view.
The collection contents appear in the Navigation view pane.

Create And Edit a Collection

You can create a collection as either a new, empty list or from the results of first searching for documents.

Note:

Use caution when creating collections in one time zone that may be viewed in a different time zone. If the search is based on criteria that includes a literal date comparison, the collection may show unexpected results. This is because of the difference in time zones between where the collection was created and where it is viewed. Date comparisons that use variables like **%CURRENTDATE%** are not affected.

PowerWeb Procedures

Use these steps for [PowerWeb](#).


Create an Empty Collection

To create an empty collection:

1. Choose one of the following options:
 - In the **Search** ribbon, in the **Collection** group, click **New Collection**.
The **New Collection** dialog box appears.
 - Right-click the folder, point to **Search > Collection**, and then select **New Collection**.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **Search > Collection** and then select **New Collection**.
2. Type a name for the new collection.
3. Click **OK**.

Create a Collection from Search Results

To create a collection from search results:

1. Run a search using **Find** as described in [Find](#).
2. To save the results as your **My Search Results** static collection, click the **Search Results** icon .


The documents may then be manipulated in the Navigation view instead of in the **Find** dialog. The collection is created if it does not yet exist or is overwritten if it does exist.

3. To save the results as a new dynamic collection with a different name:
 - a. If the **Properties** page is not visible, click **Search Results** in the navigation view to show the current search criteria.
 - b. Click options or type values using the descriptions in the following table.

4. Click **Save**.

To open the new collection for further editing, click **Execute**.

Collection options

Option	Description
Save as new dynamic collection	Type a descriptive name for the new collection.
Available for all users	Enable this option to make this collection available to other users, as a starting page for read-only PowerWeb users, or to select it as the scope of a report definition.
Add criterion	<p>Allows you to add criteria to your collection.</p> <p>To add criteria:</p> <ol style="list-style-type: none"> 1. Select a property from the property list. 2. Select a search operator from the operator list. 3. Type keywords in the text box. 4. Click the Add to List icon . The criterion is added to Current criteria. 5. To apply the new criteria and preview the current search results, click Find Now.

Edit Criteria of an Existing Collection

To edit the criteria of an existing collection:

1. Open the collection as described in [View a Collection](#).
2. Click the collection name in the navigation view to show the current search criteria.
3. Click **Edit**.
4. Choose between two options:

- To remove a criterion, deselect it in **Current criteria**.
- To add a criteria, click options or type values using the description of **Add criterion** in the preceding table.

5. Click **OK**.

Add Documents to an Existing Collection

Adding new documents to the vault while viewing a collection also adds the documents to the active collection.

To add documents to an existing collection:

1. Run a search using **Find** as described in [Find](#).
2. Select the documents that you want to add to the collection.
3. Choose one of the following options:
 - In the context menu, point to **Search** and then click **Add to Collection**.
The **Add to Collection** dialog box appears.
 - In the **Search** ribbon, in the **Collection** group, click **Add to Collection**.
The **Add to Collection** dialog box appears.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **Search** and then select **Add to Collection**.
4. In the collection list, click the name of the collection to which you want to add the selected documents and click **OK**.

The documents are added to the selected collection.

Remove Documents from an Existing Collection

To remove documents from an existing collection:

1. Open the collection from which you want to remove documents as described in [View a Collection](#).
2. Select the documents that you want to remove from the collection.
3. Choose one of the following options:
 - In the context menu, point to **Search** and then click **Remove from Collection**.
 - In the **Search** ribbon, in the **Collection** group, click **Remove from Collection**.

The documents are removed from the collection.


- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **Search** and then select **Remove from Collection**.

PowerUser Procedures

Use these steps for [PowerUser](#).

Create an Empty Collection

To create an empty collection:

1. On the **Vault** menu, click **Collections**.
The **Collections in <VaultName>** dialog box appears.
2. In the toolbar, click the **New static collection** button .
A collection named **New Collection** is added to the list and the name is editable.
3. Type a name for the new collection and press **Enter**.

Create a Collection from Search Results

To create a collection from search results:

1. Run a search using **Find** as described in [Find](#).
2. To save the results as your **My Search Results** static collection, click **Save**.
The documents may then be manipulated in the Navigation view instead of in the **Find** dialog. The collection is created if it does not yet exist or is overwritten if it does exist.
To add the results to your existing **My Search Results** collection, click the arrowhead and select **Add to My Search Results** or **Add to My Search Results and close**.

Note:

Individual documents and folders may also be added to your existing **My Search Results** collection by clicking **Add to My Search Result** on the document shortcut menu.

3. To save the results as a new static or dynamic collection with a different name or to add or remove it from an existing static collection, click **Save As**.
The **Save Search** dialog box appears.
4. Click options or type values using the descriptions in the following table.
5. Click **OK**.

Saved search options

Option	Description
Create static collection with name	Type a descriptive name for the new collection.
Create dynamic collection with name	Type a descriptive name for the new collection.
Available for all users	Enable this option to make this collection available to other users, to select it as the scope of a report definition, or as a starting page for read-only PowerWeb users.
Advanced	Displays additional options to add or subtract the results from an existing static collection. Enabled only if one or more static collections exist.

Add Documents to an Existing Collection

Adding new documents to the vault while viewing a collection also adds the documents to the active collection.

To add documents to an existing collection:

1. Select the documents that you want to add to the collection.
2. On the **Document** menu, click **Add to Collection**.
The **Collections in <VaultName>** dialog box appears.
3. In the collection list, click the name of the collection to which you want to add the selected documents and click **OK**.

The documents are added to the selected collection.

Remove Documents from an Existing Collection

To remove documents from an existing collection:

1. Open the collection from which you want to remove documents as described in [View a Collection](#).
2. Select the documents that you want to remove from the collection.
3. On the **Document** menu, click **Remove from Collection**.

The selected documents are removed from the active collection.

Configure a Dynamic Collection

Because a dynamic collection saves the criteria of a search and not the search results, you can later edit those criteria to modify the search results. You can also configure other features of a saved dynamic collection for use by read-only PowerWeb users.

To configure a dynamic collection:

1. Select an existing dynamic collection from the Navigation views list in the shortcut bar or the current view button.

2. Select the root node of the collection.

Property pages of the collection appear in the properties pane.

3. To modify the search criteria, select options on the **General**, **Property Filters**, and **References** tabs as described in [What & Where Options](#), [More Criteria Options](#), and [References Options](#) respectively.

4. To change the columns that are displayed by the collection:

- a. On the **Columns** tab, add columns to the **Displayed columns** list.
- b. Arrange their order with the arrow buttons.

The top to bottom order of the columns (properties) on the **Columns** tab determines the left to right order of the columns in the collection view.

5. To configure the collection for read-only PowerWeb access, on the **Custom Find** tab, select options and type text using the descriptions of the options in the following table.

Custom Find options

Option	Description
Make this query available to PowerWeb users	Enable this option to make the collection accessible by read-only PowerWeb users via a URL. For information on the syntax of the URL, consult a System Administrator or refer to <i>Configure a PowerWeb Location</i> in the <i>Meridian Enterprise Administrator's Guide</i> .
Caption	Type a descriptive name to display as the page caption. This name will help users to recognize what the collection represents.
Sort search results on	Select a property to sort the collection on. By default, it is sorted on the Name property.
Quick Search	Enable this option to display the Name and Quick search options on the Find page in addition to the collection's search criteria.

Option	Description
Show property filters	Enable this option to allow users to see the property filters that comprise the collection's search criteria.
Allow user to edit the condition and value	Enable this option to allow users to select other search conditions and type other search values than those that define the collection's search criteria. When this option and the Make this query available to PowerWeb users option are enabled, you might see different results in PowerWeb than in PowerUser when you initially view this collection. This is because it is assumed that you will edit the search criteria first before running the search. Criteria other than the properties and name (for example, folder and object type filters) are ignored when the collection is first shown.

Delete a Collection

Deleting a collection deletes the document list or search criteria that define the collection's view. It does not delete the documents themselves. To delete the documents within a collection, see [Delete and Undelete Documents and Folders](#).

Note:

- Before deleting a dynamic collection, resolve any dependencies on the collection such as report definitions and read-only PowerWeb start pages.
- The **My Search Results** collection cannot be deleted. To replace its contents, save the results of a new search to the collection as described in [Create And Edit a Collection](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).


To delete a collection:

1. Open the collection that you want to delete as described in [View a Collection](#).
2. In the **Search** ribbon, in the **Collection** group, click **Delete this Collection**.
The collection is deleted.

PowerUser Procedures

Use these steps for [PowerUser](#).

To delete a collection:

1. On the **Vault** menu, select **Collections**.
The **Collections in <VaultName>** dialog box appears.
2. Select the collection that you want to delete and click the **Delete** button .
3. Click **Yes**.
The collection is deleted.
4. Click **Cancel** to close the dialog.

Commands on Search Results Heading

You can perform bulk updates on files by executing commands after clicking the **Search Results** heading. This will apply the command you select to all results in your search, including results on subsequent pages. This functionality allows you to make changes to your documents more quickly.

This functionality is only available in PowerWeb.

Important!

You can only execute commands that you otherwise have access to based on your user permissions. For example, if you do not have the ability to add documents to an export package, you cannot use the **Add to Export Package** command on the **Search Results** heading.

To execute a command on search results:

1. [Conduct a search.](#)
2. Select the **Search Results** heading.

This will apply the command you select to all results in your search, including results on subsequent pages.

3. Select a command.

The available commands on the **Edit** tab are:

- [Download Document](#)
- [Lock Documents and Synchronize Workspace](#)
- [Set a Property Value](#)
- [Unlock](#)

The available commands on the **Exchange** tab are:

- [Add to Export Package](#)

The available commands on the **Workflow** tab are:

- [Run a Workflow Transition](#)

If the command you select is applicable for all files in the search results, the operation succeeds. Otherwise, the system will execute the command for the files where the command is applicable.

The available commands on the **Commands** tab are:

- Auto-Commands, or Custom Commands
[Learn more about Custom Commands.](#)

Documents in PowerWeb

Meridian makes working with documents easy. Everything you can do with a file in Windows Explorer, you can do in Meridian, and much more. Meridian takes care of the tedious organizing, tracking, and standardization of documents and lets you concentrate on using documents in your business.

You can just as easily work with documents from within your favorite editing applications. For more information, see [Application Integration](#).

Note:

Almost everything you can do with one document in Meridian, you can do with a selection (batch) of documents or folders. All you have to do differently is to select the items that you want to work with before executing the command.

If the command requires it, processing pauses for your input, which can also be applied to the remainder of the items. While the command is busy working, a progress dialog lists the number of items already processed, the number of items that remain to be processed, and the number of items that failed processing for any reason. A scrolling text log shows the result of each action for troubleshooting. You can pause, resume, or cancel processing at any time.

Open a Vault

This article describes how to open a vault in PowerWeb and PowerUser.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To open a vault:

1. Open a supported web browser.
2. Type the address of the Meridian website and press Enter.
The format of the address is: `http://<server name>/Meridian/start`
Check with a System Administrator if you are unsure of the address. The administrator may also have created a desktop shortcut for you.
3. Depending on how your system is configured, you may need to log on.
4. The vault selection page appears.
5. Click the name of the vault that you want to open.
If you have not yet selected a default scope for the vault the scope selection page appears.
6. Click the name of the scope that you want to use.
The **Folders** view appears.

PowerUser Procedures

Use these steps for [PowerUser](#).

To open a vault:

1. Start **BC-Meridian PowerUser** from the Windows **Start** menu or a desktop shortcut.
The program opens the vault that you worked in last.
2. On the **Vault** menu, click **Open**.
The **Open Vault** dialog box appears.
3. Select a vault from the list or select a different server from the **Server** list to open a vault located there.
4. To open a vault at an existing baseline or a specific moment in history, select options in the **Open at** group.

5. Click **OK**.

If more than one scope has been configured for a vault by a System Administrator, the **Select Scope** dialog box appears. Otherwise, the vault is opened and the default navigation view appears.

6. Select a scope from the list.

7. Click **OK**.

The vault opens and the default navigation view appears. For more information about scopes, see [Scopes](#).

View Documents

Meridian Enterprise includes the AutoVue viewer developed by Oracle, Inc. for viewing documents. It is the easiest way to view your documents. You can view documents in AutoVue without the document's native application installed. The viewer pane displays buttons in a toolbar that you can use to view documents in various ways and inspect them. Depending on your security permissions, you may also be able to draft print or redline documents. Regardless of what you do in the viewer pane, it will not change the document—all viewer actions are either temporary or are saved elsewhere.

Note:

- If your system is configured to use AutoVue, you might be prompted for your user name and password the first time that you view a document for each Meridian Enterprise client session.
- Oracle, Inc. may add or remove file formats in each release of the software at its discretion.


All documentation for AutoVue products is available on the [Oracle website](#). This includes the *Oracle AutoVue User's Manual* in several languages and a *Supported File Formats* document that lists the supported file formats.

To install a viewer for a file format that is not supported by AutoVue, see [Install Third-Party Viewers](#). To use a different viewer for a particular file format, see [Change Viewers](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To view a document:


- Choose one of the following options:
 - Click the document name in any navigation view.
 - In the view bar, click the **View Document** icon .
 - On the **Document** page, click the thumbnail image.
 - On the **Document** shortcut menu, click **Show Document**.

The viewer page appears in the document pane.

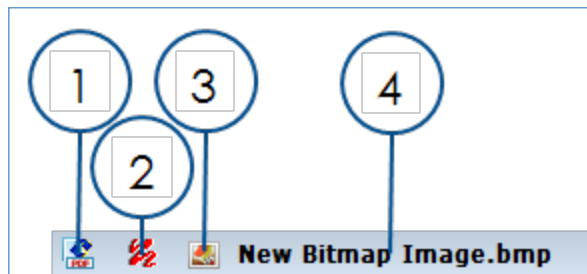
PowerUser Procedures

Use these steps for [PowerUser](#).

To view a document:

- Choose between two options:
 - To view a document when the viewer pane is not visible:
 1. Click the document name in any navigation view.
 2. Click the **Show or Hide viewer tool** button  or double-click the thumbnail image.
The document appears in the viewer pane.
 - To view a document using the **Document** menu:
 1. Click the document name in any navigation view.
 2. On the **Document** menu, click **View**.
The document appears in a new window.

The viewer info bar is shown in the following figure. It displays information about the document that is shown. The icons on the info bar are described in the following table.



Info bar icons

Number	Description
1	Native/rendition toggle – click to toggle the viewer between showing the native file and the rendition if it exists
2	Redlines icon – hover your cursor over the icon to see whether the native file or the rendition or both files have redlines
3	File icon
4	Filename

Hotspots

A hotspot defines a rectangular area in one document that is hyperlinked to another document. When you click inside the hotspot, the viewer shows the hyperlinked document. You can use this to link any type of hierarchical document set such as:

- overview maps to detailed maps
- assembly drawings to sub-assembly or part drawings
- site plans to building plans
- schematic diagrams to detail diagrams.

You can navigate between documents graphically instead of textually (by name or other properties).

- Hotspot information is stored separate from the document to which it refers. If the scale or coordinate space of a document is changed, the hotspot information is not changed accordingly and must be manually updated.
- Hotspot changes that are made to a project copy overwrite the hotspots of the master document when the document is released as the latest revision.
- Hotspots appear as filled rectangles by default. To show outlines in an AutoVue desktop deployment, set the option in the **Viewer Options** dialog box described in [Change Viewers](#). To show outlines in an AutoVue Client/Server deployment, add **HOTSPOTSTYLE=1** to the `allusers.ini` file described in *Deploy standard viewer settings* in the *Meridian Enterprise Administrator's Guide*.

Hotspots can be created manually or automatically. A document may contain an unlimited number of hotspots. Text for reference can also be assigned to a hotspot similar to the memo or sticky notes features in other applications. Hotspots may be created for the DWG, DGN, TIFF, and PDF file formats.

Hotspots can be generated automatically for drawing tags and linked to tag objects in the vault. Only the blocks that have been configured for tag extraction by a System Administrator will display drawing tag hotspots. This functionality is not supported by AutoVue.

Create, Edit, and Delete Hotspots

You can create and edit hotspots in the viewer window to navigate quickly to related documents or tags or to show related text.

Note:

The display style of hotspots can be configured with the **Hotspots render style** option on the **General Options** page of the **Viewer Options** dialog box as described in [Change Viewers](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To add or edit a hotspot in a PDFTron rendition, you must first [view the rendition](#) you want to change and the select hotspot edit mode.

To select hotspot edit mode:

1. Click **Edit**.
The **Edit** toolbar opens
2. Click **Edit Hotspots**
The redline tools disappear. You can now add, edit or delete hotspots as described below.
3. To end the editing session and save the hotspots to the rendition, click **Save** in the toolbar.

Add Hotspot

To add a hotspot:

1. At the location where you want the hotspot, click and drag to draw the hotspot you want.
The **Hotspot** dialog box opens.
2. In the **Tag number** field, enter the **Asset Number** of the document you want to link to.
3. Click **Refresh**.
The **Linked documents** pane lists the documents that you can link to from the hotspot.
4. To set the **Type**:
 - a. Click the ellipsis button.
 - b. In the **Tag type** field that appears, enter the **Asset Type** for the object you want to link to.

5. If you want the hotspot to link to multiple targets, in the **Expression** field enter the wildcard or expression to generate the targets.
6. Click **Save**.

Edit Hotspot

To edit a hotspot:

1. Select the hotspot you want to edit
The **Hotspot** dialog box opens.
2. If you want to change the hotspot target of a manually created hotspot:
 - a. In the **Tag number** field, enter the **Asset Number** of the document you want to link to.
The **Linked documents** pane lists the documents that you can link to from the hotspot.
 - b. If you want the hotspot to link to multiple targets, in the **Expression** field enter the wildcard or expression to generate the targets.

If both **Tag number** and **Expression** are set, the hotspot will refer to all documents which exactly match **Tag number** and all documents which match the **Expression**.

3. To set the **Type**:
 - a. Click the ellipsis button.
 - b. In the **Tag type** field that appears, enter the **Asset Type** for the object you want to link to.
4. Click and drag the handles around the hotspot until you have the size and shape you want.
5. Click **Save**.

Delete Hotspot

To delete a hotspot in edit mode:

1. Select the hotspot you want to delete.
2. Press the **Delete** key on your keyboard.

Delete All Hotspots

To delete all hotspots from a rendition:







1. Select the document or batch of documents you want from the **Documents** list.
2. On the **Edit** ribbon in the **Organize** group, select **Delete > Delete Hotspots**.
3. Click **OK**.

PowerUser Procedures

Use these steps for [PowerUser](#).


To create and edit hotspots one of the AutoVue viewers must be the active viewer for the selected document. For information on configuring the viewer for different file formats, see the [Change Viewers](#).

Create a Hotspot



1. While viewing the document within which you want to create a hyperlink, click the **Edit Hotspots** button .
The hotspot toolbar appears.
2. Click the **New** button .
The cursor changes shape to crosshairs .
3. Click and drag a rectangle in the document to specify the hotspot outline.
A shaded rectangle with square grips appears.
4. Click the **Set Info** button .
The **Hotspot Information** dialog box appears.
5. Click the browse button .
The **Select Documents** dialog box appears.
6. Select a document to link to the hotspot and click **OK**.
The path and file name of the selected document appears in the **Hotspot Information** dialog.
7. Type optional descriptive text in **Description**.
8. Click **OK**.
9. Click the **Edit Hotspots** button  again to hide the hotspot toolbar.

Edit a Hotspot

To edit a hotspot:

1. Click the **Edit Hotspots** button .
The hotspot toolbar appears. All existing hotspots appear as shaded rectangles.

2. Choose one or more of the following options:

- To move a hotspot:
 - a. Move the cursor into the hotspot until the cursor becomes a four-sided arrow .
 - b. Click and drag the hotspot to the new location.
- To resize a hotspot:
 - a. Move the cursor over the grip closest to the part of the hotspot that you want to resize until the cursor becomes a two-sided arrow . The arrowheads indicate the directions in which you can resize the hotspot with the selected grip. If you want to resize the hotspot in a different direction, move the cursor over a different grip.
 - b. Click and drag the grip to resize the hotspot into the shape and size that you want.
- To edit the hotspot hyperlink information, select the hotspot that you want to edit and perform steps 4 through 8 above.


Navigate Hotspots

You can click hotspots in the viewer window to navigate quickly to related documents or tags or to show related text. Hotspots can be created manually as described in [Create, Edit, and Delete Hotspots](#).

Viewing hotspots requires that one of the AutoVue viewers be the active viewer for the selected document and that the hotspots are visible. For information on configuring the viewer for different file formats, see [Change Viewers](#).

Use these steps for [PowerUser](#).

To navigate drawing tag hotspots:

1. In the viewer window toolbar, click **Hide/Show Hotspots** .

A blue rectangle appears for each hotspot. To hide the hotspots, click **Hide/Show Hotspots** again.

If the document contains a lot of blue entities that making distinguishing the hotspots difficult, you might want to turn off display of some blue colored layers.

2. To navigate to a linked object or display related text, click anywhere within the hotspot.

If the hotspot is linked to related text, the text is shown but the selected document remains open in the viewer window.

If the hotspot is linked to a document or object, it is opened in the viewer window.

If so configured by a System Administrator, a **Select Destination** dialog will appear showing the linked object and the other vault tags that it references. Select a destination object and click **OK**.

Install Third-Party Viewers

File formats for some applications are not directly supported by Meridian Enterprise. If you need to view an unsupported format, a free viewer is often available for download from the application developer's website or installed with the application. To integrate with Meridian Enterprise, a third-party viewer must be an ActiveX control. Some viewers are detected automatically by Meridian Enterprise if they are installed on the same computer. Some other third-party viewers can be detected by Meridian Enterprise if support for them is installed on the computer.

A number of registry files are installed with Meridian Enterprise that enable this support for some of the more popular third-party file formats and viewers. For a list of the viewers that are supported by this version, see the *Third-Party Viewers* article in the *Meridian Enterprise Supported Software* document.

Important!

Consult your System Administrator if you are unsure how to perform this procedure and before installing any of the registry files. You may not have sufficient security permissions to install them.

Use these steps for [PowerUser](#).

To install support for a third-party format or viewer:

1. Install the third-party viewer on your computer.
2. Using Windows Explorer, navigate to `C:\Program Files\BC-Meridian\Program\Viewers`.
3. Select the registry file that corresponds to the file format or viewer installed on your computer.
4. Double-click the registry file to add its information to your registry.
5. Restart Meridian Enterprise if it was running when you installed the registry information.
6. Select a document in the format for which you just installed support.

The document should appear in the viewer. If the file does not display and you have installed a third-party viewer for the format, see [Change Viewers](#).

Change Viewers

You might prefer the way one viewer displays a particular file format over another viewer or the way the tools work in one viewer better than another viewer.

When you display a document, PowerUser or PowerWeb tries to use the first viewer in its list of available viewers for each file type. If the first viewer fails, it moves on to the next viewer in the list.

To use this feature, you must be an administrator of the computer or User Account Control (UAC) must be disabled.

Note:


- System administrators can disable this feature.
- For information about third-party viewer tools, refer to that viewer's documentation.

PowerWeb Procedures

Use these steps for [PowerWeb](#).


In PowerWeb, this feature is only available Internet Explorer when ActiveX compatibility mode is selected. When this is not the case, only PDFTron and Forge are supported.

To change the order of the viewers:

1. Select your user.
2. In the context menu that opens, select **Preferences**.
The **Change preferences for *YourUser*** page opens.
3. Select the **ActiveX compatibility mode** check box if it is not already selected.
4. Click **Viewer options**.
The **Meridian View Control** dialog box opens. The **Viewer Priority** page, under **Use viewers in order** contains the list of available viewers for the selected file type.
5. Select the viewer you want then move it to the top of the list using the  button.
6. Click **OK**.


PowerUser Procedures

Note:

If hyperlinks in PDF documents do not work as expected, click the **Options** icon  with the Acrobat viewer selected as described below and then enable **Embed Acrobat viewer into Web Browser control**.

Use these steps for [PowerUser](#).

To change the order of the viewers:

1. Select a document of the format for which you want to select a different viewer.
For example, select an AutoCAD drawing file if you want to use a different viewer for this file format.
2. Right-click in the viewer pane and select **Viewer Options**.
The **Meridian View Control** dialog box appears. On the **Viewer Priority** page, under **Use viewers in order** is the list of available viewers for the selected file type.
3. Select the desired viewer from the list and move it to the top of the list using the  button.
4. Click **OK**.
You should now see the document displayed with the chosen viewer in the viewer pane.
This procedure applies to all file formats and all viewers.

Install the AutoVue Document Converter

The AutoVue viewer features the ability to convert documents to Adobe PDF format. It does this with the AutoVue Document Converter printer driver. By default, this driver is not installed with Meridian Enterprise but you can install it if you want to use the **Convert** command.

Use these steps for [PowerUser](#).

To install the AutoVue Document Converter:

1. Start the setup program `C:\Program Files\Common Files\Cyco Shared\AutoVue\InstallPdfPrintDriver.exe`.

The **AutoVue Document Converter** window appears and shows the installation progress and results.

2. Click **OK**.

You may then use the **Convert** command as described in the *Oracle AutoVue User's Manual* that is available in the Meridian Enterprise distribution package and at the [Oracle website](#).

Create a New Document From A Template

Meridian makes it easy to create new documents either from templates or from existing files.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Import an Existing File

To import an existing file:

- See [Upload Documents](#).

Create New Document from Template

To create a new document from a template:

1. Select the folder where you want the new document to reside.

If the location of new documents is controlled by the vault's Field-Path definition, you can select any folder because the Field-Path definition will store the document in the correct folder regardless.

2. Choose between three options:

- In the **New** ribbon, in the **Documents** group, click **New Document**.
The **Add Document/Select Document Type** dialog box appears.
- Right-click the folder, point to **New**, and then select **New Document**.
- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **New**, and then select **New Document**.

3. Select a document type from **Document type** and click **Next**.

4. Select a template from **Document template** and click **Next**.

Any property pages assigned to the document type for new documents appear.

The default values of the properties on these pages are the names of the corresponding folders in the path that you selected in step 1.

5. Type any known values in the property pages and click **Finish** when you are done.

The new document is created in the current folder or, if its location is controlled by the vault's Field-Path definition, it is created in that folder. The configured document type workflow (if any) is started and the document's **General** property page appears.

PowerUser Procedures

Use these steps for [PowerUser](#).

Import an Existing File


To import an existing file:

- See [Import Files Using Drag And Drop](#).

Create New Document from Template

To create a new document from a template:

1. Choose one of the following options:

- On the **Vault** menu:
 - a. Point to **New**.
 - b. Select a document type from the sub-menu.
 - c. Select a template from the next sub-menu.
- Click the **New Document** button  on the Main toolbar.
- In any Navigation view:
 - a. Right-click the destination folder to display the **Folder** shortcut menu.
 - b. Point to **New**.
 - c. Select a document type from the sub-menu.
 - d. Select a template from the next sub-menu.
- Select a document type and template and then click **Create**.

The vault might be configured to prevent access to certain document types. If so, instead of sub-menus appearing as described above, the available document types and templates are presented in a dialog box. If a scope is active, document types that are not enabled for that scope will not appear for selection.

If the document type you selected has property pages associated with it, they will appear for you to type any known information.

2. Complete each property page and click **Next** or **Finish**.

A new document is created in the current folder or in the folder calculated by the Field-Path definition of the vault configuration.

The default values of the properties on these pages are the names of the corresponding folders in the path that you right-clicked.

If the document type you selected performs automatic document naming, Meridian assigns a calculated name. If not, a default document name is assigned that you may overwrite with any name you want.

Note:

Document names that begin with a period are not allowed, although periods may be used elsewhere in the name.

Upload Documents

With PowerWeb, you can upload files to the vault either as new documents, to replace the content in existing documents, or as new or updated renditions.

Note:

- To upload more than one document at a time, the **ActiveX compatibility mode** option must be enabled as described in [Personal Preferences](#).
- If errors occur while uploading large files, a System Administrator might need to configure the web server to accept larger files than the default size.
- The document type that is assigned to imported documents is determined by the following precedence:
 - Document type assigned to the file extension.
 - Default document type of the active vault if available in the active scope.
 - Default document type assigned to the active scope.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Upload Files as New Documents

To upload files as new documents in the vault:

- See [Import Files Using Drag And Drop](#).

Upload File to Replace Document

Note:

- To prevent errors, the document must be in a released workflow state or the vault must be customized to release the document upon replacement of the content.
- By default, the redlines for the existing document content will be deleted. If the redlines should be retained (to check that changes to the document have been done properly, for example) consult a System Administrator about disabling this behavior.

To upload a file to replace the content of an existing document in the vault:

1. Locate the document for which you want to replace its content.
2. In a navigation view, right-click the name of the document and on the shortcut menu that appears, point to **Document** and then click **Replace Content**.

The **Replace Content** dialog box appears.

3. Click **Browse** and select the file that you want to upload.
4. Click **Yes**.

Upload File as Rendition of Existing Document

To upload a file as a rendition of an existing document in the vault:

1. Locate the document for which you want to upload its rendition.
2. Choose between two options:
 - In a navigation view, right-click the name of the document and on the shortcut menu that appears, point to **Document** and then click **Attach Rendition**.
 - If a rendition is already attached to the document, click **Upload Rendition**.

The corresponding dialog box appears.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Point to **Edit** and then select **Attach Rendition** or **Upload Rendition**.
3. Click **Browse** and select the file that you want to upload.
 4. Click **Yes**.

The file is uploaded to the selected document as its rendition.

PowerUser Procedures

Use these steps for [PowerUser](#).

To upload files as new documents in the vault:

- See [Import Files Using Drag And Drop](#).

Download Documents

When you place documents under change to yourself in a workflow as described in [Route a Document In a Workflow](#), the documents are automatically downloaded to your local workspace, ready for editing. In other situations when you want a local copy of documents, you must download them manually. To download the rendition of a document, see [Download Renditions](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Download Documents to Local Workspace

To download documents to the local workspace on your computer:

1. In any navigation view, select the documents that you want to download.
2. Choose one of the following options:
 - In the **Edit** ribbon, in the **Download** group, click **Download Document**.
 - Right-click over your selection, point to **Edit**, and then click **Download Selected**.
If your computer is configured to use a site cache, a confirmation dialog box appears if:
 - This is the first time that you have used the site cache.
 - You are working from a different computer than the last time that you used the site cache.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **Edit** and then select **Download Document**.
3. Click **Yes**.

The documents download to the local workspace folder on your computer in the background.

Download Documents to Specific Location

Note:

- This task requires the **ActiveX compatibility mode** option be enabled as described in [Personal Preferences](#).

- It is not possible to use this option to download documents with their references.

To download documents to a specific location on your computer:

1. In any navigation view, select the documents that you want to download.
2. In the **Edit** ribbon, in the **Download** group, click **Download to Folder**.

The **Meridian Upload/Download Control** dialog box appears.

3. Select the desired options and then click **OK**.

The documents download to your computer in the background.

Download a Batch of Documents

To download a batch of documents:

1. [Conduct a search](#).
2. Select the **Search Results** heading.

This will apply the command you select to all results in your search, including results on subsequent pages.

3. Select the **Download Document** command from the **Edit** tab.

If your computer is configured to use a site cache, a confirmation dialog box appears if:

- This is the first time that you have used the site cache.
- You are working from a different computer than the last time that you used the site cache.

4. Click **Yes**.

The documents download to the local workspace folder on your computer in the background.

PowerUser Procedures

Use these steps for [PowerUser](#).

To download documents to your computer:

1. In a navigation view, select the documents that you want to download.
2. Drag and drop the documents onto your desktop or the Windows Explorer location where you want to work with them.

Import Documents

There are many ways to get documents into a vault, including:

- Creating documents from templates as described in [Create a New Document From A Template](#).
- Copying existing vault documents (including deriving and replacing documents) as described in [Copy Commands](#).
- Saving documents into a vault from their native applications as described in [Application Integration](#).
- Importing with drag and drop as described in the following topic.
- Importing with packages as described in the following topic.
- Importing from a database (by a System Administrator)
- Importing with the **Document Import Tool**
- Importing CAD drawing assemblies with the **Assembly Import Wizard**

All of these methods create new documents, but the method you choose should be determined by the type and quantity of documents that you want to import and convenience.

Import Files Using Drag And Drop

Drag-and-drop is a convenient and easy way to add small quantities of files to a vault. For larger quantities, see [Document Import Tool](#). To import documents with PowerWeb, see [Upload Documents](#).

Important!

After files have been imported to a vault, document properties that were not explicitly set during the import (from title blocks, default property assignments, and so on) contain no values. Those properties will not be synchronized to the imported content files by the Meridian application links. This is by design to prevent overwriting existing values.

The properties can be synchronized *from* the imported content files. Such properties must be set in the vault to an explicit value at least once before the properties will be synchronized to the content files.

Additional Notes about Functionality

- Your Administrator can configure the maximum file size you are allowed to import. Files exceeding this limit cannot be uploaded. To upload these files, use [the Local Workspace client](#).
- If the vault is configured to use the same document type for all Autodesk Inventor assembly files (.iam, .idv, .ipt, .idw, .ipn), all of the files will become one hybrid document if you drop them at the same time into the vault. Instead, first drop those files that you do not want to be part of the hybrid document (.ipt, .idw, and .ipn), and then drop the assembly (.iam and .idv) files.
- Importing files with external references in this way will not create Meridian references.
- The document type that is assigned to imported documents is determined by the following precedence:
 - Document type assigned to the file extension.
 - Default document type of the active vault if available in the active scope.
 - Default document type assigned to the active scope.
- Drag and drop also works to export documents from Meridian to Windows Explorer or your desktop.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

The behavior of PowerUser and PowerWeb differ in a small number of ways and this is one of them. Some document types that are allowed to be imported using drag and drop in PowerUser might not be allowed to be imported in the same way in PowerWeb depending on the **Document type availability** setting in the configuration of the document type. For assistance with this issue, consult with a System Administrator.

To import using drag and drop:

1. Open the folder where you want to import the documents.
If you want to import the files to an existing document, select it.
2. Choose one of the following options:
 - To import directly into the PowerWeb window:
 - a. Drag the files from Windows Explorer, Microsoft Outlook, or your desktop onto the PowerWeb window and drop them.
If the selected document is locked or read-only, a dialog box appears for you to select an action.
 - b. Select an import action from the dialog box that appears.
The available actions depend on the selected document, the number of files dropped, and their file extensions.
 - To import from the ribbon:
 - a. In the **New** ribbon, in the **Documents** group, click **Import Documents**.
The **Import Documents** dialog box appears.
 - b. Drag the files from Windows Explorer, Microsoft Outlook, or your desktop into the **Import Documents** window and drop them.
 - To import from the folder context menu:
 - a. Right-click any folder, point to **Folder**, and click **Import Documents**.
The **Import Documents** dialog box appears.
 - b. Drag the files from Windows Explorer, Microsoft Outlook, or your desktop into the **Import Documents** window and drop them.
 - To import from [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **New**, and then select **Import Documents**.
The **Import Documents** dialog box appears.

- c. Drag the files from Windows Explorer, Microsoft Outlook, or your desktop into the **Import Documents** window and drop them.
3. Choose between two options:
 - To select more files to import, drag the files onto the file list and drop them.
 - To select the files to import using a file browser:
 - a. Click **Add**.
 - b. Select the files to upload.
 - c. Click **Open**.

The file names are added to the file list.

Select a file and click **Remove** to remove it from the list.
4. If you also want to create Meridian references between the files that have external references, enable **Synchronize References from Files**.
5. If the current view is not the **Folders** view, the **Import Document/Select Folder** dialog box appears.

If necessary, select a different folder in the **Folders** view where you want the imported document to reside.
6. Click **Next**.
7. If a page appears prompting you to select a document type for the files that you uploaded, select one from **Document type** and click **Next**.
8. If any property pages appear for the documents you are importing, type any known values in the property pages and click **Finish** when you are finished.

A progress dialog box shows the results while the files are imported. The files are uploaded to the selected folder or, if their location is controlled by the vault's Field-Path definition, they are created in the appropriate folders.

PowerUser Procedures

Use these steps for [PowerUser](#).

To import using drag and drop:

1. Open the vault folder that will be the destination of the documents.
2. Select the files that you want to import from Windows Explorer, Microsoft Outlook, or your desktop.
3. Drag and drop them onto the destination folder or onto any document in the destination folder.

If you selected only one document and dropped it onto an existing document, a shortcut menu appears:

- a. Select **As New Revision** to import the file as a new revision of the document upon which you dropped it.

This command is only available if the vault document is released.

Because this action will create a new revision and the document is in a released state, this command must be customized to place the document in the correct state of a workflow according to your organization's business process for this action. If the command is not customized, an **Access is denied** error will result and the action will fail.

- b. Select **Replace Document Content** to overwrite the vault document's content with the file.

The file extension is updated if it is different. This command is only available if the vault document is under change in a workflow.

- c. Select **As New Document** to import the file as a new document in the selected folder.

Meridian then detects the file extension of each dropped file that will become a new document in the vault and finds the document types associated with the file extension. If a file extension is associated with more than one document type, a dialog box listing the associated document types appears.

4. Select the document type you want applied to the imported document.

If a scope is active, document types that are not enabled for that scope will not appear for selection.

If the document type is configured to support hybrid documents and you are importing multiple files with the same name but different extensions, the files are imported as main parts and attached parts depending on the file extensions. If a default file extension for renditions is configured and documents with the same names but different extensions exist in the vault, the files are attached as renditions of the vault documents.

If the document type of the first imported file has property pages associated with it, they will appear next for you to type any known information.

5. If you want to apply the same information to all of the imported documents that have the same document type, select **Apply for all other documents of this type**.

The default values of custom properties are the names of the corresponding folders in the path where the documents are created. However, if files are dropped on a subfolder of the selected folder, the values may be incorrect.

6. Complete each property page and click **Next** or **Finish**.

Property pages then appear for each of the remaining imported files, in turn, unless you selected **Apply for all other documents of this type**.

7. Complete each property page and click **Next** or **Finish**.

A progress dialog box shows the status of the overall import process until all of the files are imported. Meridian creates new documents for each of the imported files and places them in the current folder or in the folder calculated by the Field-Path definition of the vault configuration.

If the document types of the imported files perform automatic document naming, Meridian assigns a calculated name to each new document. If not, a default document name is assigned that you may overwrite with any name you want.

Document Import Tool

The **Document Import Tool** is a powerful way to import large numbers of documents into a vault more conveniently than with drag and drop. It works like the **Database Import Wizard** available to System Administrators in the Configurator, but is a little simpler and easier for end users to manage. With the **Document Import Tool**, you can:

- Import any number of documents from various locations using a single data file
- Import property data from standard ODBC-compatible data files
- Let the import run unattended while you do other things
- Import multiple hybrid document files into a single hybrid document
- Import data from CAD drawing title blocks
- Import entire assemblies or subassemblies while maintaining references
- Populate the properties of imported documents from the data file or with fixed values
- Import new revisions of documents already residing in a vault
- Save different combinations of import options as templates for reuse later
- Monitor import progress and statistics

Configuring these options correctly takes a little time, but the settings can be saved to configuration files and reused for similar import projects.

Important!

Before attempting a large import, back up the vault first. That way, if the import does not go as planned, you can reverse the import easily by restoring the backup. Contact your System Administrator about performing the Prepare For Backup operation before using the **Document Import Tool**.

Note:

- To import CAD assemblies and their references, use the **Assembly Import Wizard** described in [Import Assemblies](#).
- This tool is not supported in PowerWeb. Consider using import packages as described in [Packages](#) instead.
- Perform very large imports after business hours so that server performance is maintained for production work.
Importing thousands of documents with the **Document Import Tool** can cause delays that are unacceptable to other users.

Create An Import Data Source File

The success or failure of a bulk import performed by the **Document Import Tool** is very often determined by the quality of the data source file. Creating an accurate and powerful data source file doesn't require a computer science degree. You can create one in an application you probably already know, just by being prepared, being organized, and paying close attention to details. After you've created a working data source file, you can reuse the basic structure of the file over and over again for future imports just by changing the data.

Following are guidelines and suggestions for creating a data source file for the **Document Import Tool**:

- Choose the file format you know best. Practically any ODBC data file will work equally well with the **Document Import Tool**; there are few advantages of any one over another. The important thing is to be able to easily create the necessary data structure of the file and document type metadata.

If you regularly import documents from other departments, divisions, or external business partners, you might be able to get them to create the data file for you if you give them these guidelines, especially if they have the document data readily available and you do not. Alternatively, you might have to accept their document data in whatever format you can get from them and then convert or clean up the data yourself into a format usable by the **Document Import Tool**. Popular data file formats include Excel, Access, comma-separated value (CSV), and plain text.

Note:

If you decide to create the data in a MS Office format, select a file type that is compatible with the combination of the versions of Meridian and Office that are installed on your PC. The **Document Import Tool** only supports the Office 2007 or higher file types (for example, `.xlsx`) when both applications are either 32-bit or 64-bit. With a mix of 32-bit and 64-bit applications, the **Document Import Tool** only supports the older (for example, `.xls`) file types. Using the `.xls` file format with the **Document Import Tool** running on Microsoft Windows 7 or later requires installation of the [Microsoft Office Access database engine 2007](#). Alternatively, save the file in the CSV format and import it.

- You will need the following document metadata at a minimum, in order to successfully import documents into a vault:
 - **Path** — To the source file to be imported. This path should be relative to the computer that will be running the **Document Import Tool**. Use URLs to specify paths on other computers rather than mapped drive letters that may not exist or match. Any files not found in this location will not be imported, so this field is the most important of all. Confirm that every file exists before you start an import.

- **File name** — In addition to the full path to the file above. This value will be used to assign the document's name in the vault. If you can, use a query inside your application to create this data for you if you don't have it in a separate field already.
- **Revision number** — This is another critical piece of metadata. Without it, Meridian will assign the first revision number from the revision scheme of the destination document type to your imported documents. This number may be lower than the actual revision number of the document. Without accurate revision numbers, you can never fully trust the documents to be accurate.
- **Document type** — This data is less critical than the others listed here because the document type of a document can be changed later, although you don't want to have to change the type of many documents. Without this data, Meridian will assign the vault's default document type to imported documents. If this is the type you want them to be, that's good. If not, that's not so good. Better yet, specify the document type in your data file and be sure. This is necessary data if you want to import a mix of document types in the same batch.
- If you have additional metadata, or you can make it from other fields or sources, you will be glad if you import it so that it is available for reference and searching. Optional, but important, metadata fields include:
 - **Status** — The workflow state of the documents being imported (Under Change, Released, Retired, In Review, and so on).
 - **Created by/Modified by** — These fields can either be operating system file data or data maintained in another data file. Either way, knowing who created and/or modified the document last will be valuable.
- If you have any other legacy metadata about the documents being imported, take time to carefully consider every piece. Any data that will help identify documents should be a candidate for import. Numbers, names, codes, document titles, departments, comments, sizes, and so on can all be valuable when it comes time to search for and revise the imported documents with confidence.

Note:


Consult a database expert within your organization to help you create the best possible data file. They may be able to save you a lot of time and effort and help produce a better result. When the documents are in the vault, the metadata will be more difficult to change.




Load a Configuration File

If a **Document Import Tool** configuration file exists for the documents you want to import, you can quickly load its settings and begin importing documents almost immediately.

Use these steps for [PowerUser](#).

To open the **Document Import Tool** and load an existing import configuration file:

1. Open the destination vault in PowerUser.
2. From the **Vault** menu, select **Document Import Tool**.
3. Click **DataSource** in the left pane.
4. Select a configuration file from the **Configuration** list or click **Browse** and select a file, and then click **Load Configuration**.
5. Click the **Start Import** button  to begin the import.

Whenever an import is not running, you can create a new import configuration file by clicking the **New** button . Click the **Open** button  to select a different import configuration file to work with. Click the **Save** button  to save the current configuration options to an open or new configuration file.




Control the Document Import Tool

After all the options necessary to complete a document import have been set or an existing import configuration file has been loaded in the **Document Import Tool**, you are ready to start the actual import process.

Important!

Beware of importing the same documents more than once. The **Document Import Tool** will create copies of documents previously imported, with names like *<DocumentName> (2) .<Extension>*.


The **Document Import Tool** has several buttons that allow you to control the import process:

-  **Start Import** — Begins the data import process.
This button is cleared if the field containing path information to the source documents has not yet been selected in the **File path field** option.
-  **Stop Import** — Stops the data import process entirely.
If the import has been stopped, it must be restarted from the beginning.
-  **Pause Import** — Pauses the data import process.
This stops the import temporarily but allows it to be resumed by clicking **Start Import**.

Monitor an Import

When an import is running, you can monitor its progress and estimate when it will be done by viewing the **Import Details** property page. Click **Import Details** in the left pane to display the **Import Details** property page containing import statistics, individual file results, and any errors.

When the import has completed, a summary dialog displays the final results. If you specified an

XSL style sheet on the **Miscellaneous Settings** page, click the **Generate Report** button  to generate an HTML report file of the results. The button is cleared if no XSL style sheet is selected.

Configure Data Source Settings

The data source settings of the **Document Import Tool** determine:

- Where the import configuration file will be saved (for later reuse)
- Where the data file containing the imported documents' property values is located and, if the data file contains multiple tables, which table to import
- The name of the field in the data file that contains pointers to the document files to be imported

To configure the data source settings:

1. Click **DataSource** in the left pane.
The **DataSource** property page opens in the right pane.
2. Select options and type text using the descriptions in the following table.

DataSource options

Option	Description
Configuration	To create a new configuration file, click Browse , select a destination folder for the import configuration file, type a name in File Name , and click Open . To load an existing configuration file, see Load a Configuration File .
Unattended Operation	Processes the entire import database without interruptions from errors. Any errors will be listed in the Errors tab of Import Details .
Database	Click Browse , select the appropriate file type in Files of type , and select an existing file containing the path and property data for the documents you want to import. See Create An Import Data Source File for guidelines on creating a suitable file.
Select the table to import from	If the import data source file contains multiple tables or worksheets, select the one containing the data you want to import from.
File Path Field	If the data source includes a field that contains the fully qualified file names of the source files to import, select The field contains the full path . If the data source field contains a relative path or only file names, select The field contains relative path and type either the base path (that is common to all relative paths) or the parent folder (of all the file names) in Base path .
Select the field that contains the path of the document	Select from the list the field within the data source file that contains the path to the documents to be imported.

Configure the Miscellaneous Settings

The miscellaneous options of the **Document Import Tool** determine:

- The vault folder where documents will be imported
- How hybrid document parts will be joined together
- If drawing title block fields will be read during import to populate the new documents' properties
- If external references between CAD files will be resolved after import
- What document type to assign to the imported files
- An optional XSL style sheet that can customize the report of results

To configure the miscellaneous settings:

1. Click **Miscellaneous Settings** in the left pane.
The **Miscellaneous Settings** property page displays in the right pane.
2. Select options and type text using the descriptions in the following table.

Miscellaneous options

Option	Description
Destination Folder	Select a folder inside the vault to receive the imported documents. If properties that are controlled by the Field-Path definition are populated during import, the files will be imported into the corresponding folder structure or newly created folders, as necessary, instead of this folder.
Create an empty document if file to import doesn't exist	Enable this option to create documents in the vault that have no file content. This option is useful for creating asset tags in the vault to support the Meridian Asset Management Module or to manage hard copy documents for which no electronic file exists.
Hybrid Mapping	Enable Import hybrid components as parts of the hybrid document type , if desired, and select a database field from the list that contains values that are common between the hybrid part files. All files imported with the same values in this field will be created as a single hybrid document using the document types configured in the vault. Consult a System Administrator for information on the file extensions that are configured as hybrid documents.

Option	Description
Import title block data	<p>Enable this option to cause the Document Import Tool to read the title blocks of CAD drawings. The title block settings must be configured for the selected document type by a System Administrator in Meridian Enterprise Configurator.</p> <p>Consult a System Administrator for information on your vault's title block import configuration.</p>
Resolve references	<p>Enable this option to cause the Document Import Tool to attempt to resolve any external references stored within CAD drawings to other documents that are also being imported by the tool or that already exist in the vault.</p>
From database field	<p>Select a field in the data source file that contains values that match the names of existing document types to assign to the imported documents. If no field is selected or no matching document type is found, the documents will be assigned the default document type.</p> <p>If a data source field name contains the text Type (for example, Document Type), it will be selected by default.</p> <p>If a scope is active, document types that are not enabled for that scope can still be used for the imported documents and the documents will be imported.</p>
Same type for all documents	<p>Select a document type from the list to assign to all documents in the current batch.</p> <p>If a scope is active, only the document types that are enabled for that scope are listed.</p>
Add the rendition file to the document	<p>Creates a rendition for the imported document using a separate file. Select the field in the data source that contains the rendition path from the list.</p>
XSL style sheet	<p>Select an optional style sheet to be used to format the import results report. A sample style sheet is provided in the C:\Program Files\BC-Meridian\Program folder.</p>

Configure the Initialize Properties Settings

The **Initialize Properties** settings of the **Document Import Tool** determine:

- How the properties of imported documents will be populated with data, if at all
- Whether new versions of documents will be created for existing documents

Important!

After files have been imported to a vault, document properties that were not explicitly set during the import (from title blocks, default property assignments, and so on) contain no values. Those properties will not be synchronized *to* the imported content files by the Meridian application links. This is by design to prevent overwriting existing values.


The properties can be synchronized *from* the imported content files. Such properties must be set in the vault to an explicit value at least once before the properties will be synchronized to the content files.

To configure the **Initialize Properties** settings:

1. Click **Initialize Properties** in the left pane.


The **Initialize Properties** property page opens in the right pane. The custom properties defined in the vault's configuration are listed along with their property set and data type. This view of the properties is one of several provided by the **Document Import Tool**.

If the data source field name matches either a Meridian property internal name or display name, it will be mapped automatically.

2. Click the **Properties Page Layout** button  to select other views.
3. For each field (except the file path field specified on the **DataSource** page) contained in the data file selected for the import operation, select a corresponding vault property in the list.
4. Enable **Initialize** in the lower-right pane.
5. Select options and type text using the descriptions in the following table.
6. Repeat steps 2 through 4 for each field in the data source file.

Property initialization options

Option	Description
Use naming expression to calculate file name	<p>If enabled, the name of the imported document will be calculated by the expression set for the document type that is assigned to the file instead of from any particular database field.</p> <p>This option is only available when the Name property is selected.</p>

Option	Description
With fixed value	<p>Assigns a single value to the selected field for every imported document. Type the value in the text box.</p> <p>If the property's validation configuration limits its values, select an existing value from the list.</p>
From database field	<p>Imports the value for each document from the data file. Choose a field from the list that corresponds to the selected property.</p>
Document key property	<p>Causes the Document Import Tool to search for existing documents in the vault in order to add new revisions using the imported documents. The Document Import Tool will search for a matching value between the selected field and the selected property.</p>
With result of expression	<p>Type a VBScript expression to calculate the value you want to set in the selected property. Click the Meridian Script Editor button  to display the Meridian Script Editor dialog to help you build and validate an expression.</p>
Check property validation	<p>Validates the property value from the database against the rules configured for the property in the vault. If the validation fails, the value is not imported and an error is added to the Errors tab in the Import Details property page.</p>

Configure the Revisions Settings

The **Revisions** settings of the **Document Import Tool** determine:

- Whether or not new revisions are created in the vault from imported documents
- How to handle existing documents undergoing changes in a workflow
- Whether imported revisions should be created as derivatives or replacements of existing documents
- How imported revisions and existing documents are matched based on the source data file

To configure the **Revisions** settings:

1. Click **Revisions** in the left pane.
The **Revisions** property page opens in the right pane.
2. Click options or type values using the descriptions in the following table.

Revisions options

Option	Description
Create new revisions for updated documents	Updates documents within workflows from the imported documents. This is most useful if you regularly receive document updates from an external business partner.
Replace contents for documents in workflow	Prevents the creation of a new revision and updates the existing file.
Create new revision for document in workflow	Leaves the current revision intact and creates a new revision with the imported document.
Import files as new documents	Prevents any revision creation and imports the files as new documents in the vault.
Import revisions as derivatives of the same document	Creates a derivative for the matching document with the imported document.

Option	Description
Import revisions as replacements of the same document	Creates a replacement for the matching document with the imported document.
Skip document if it already exists	Prevents importing documents that already exist in the vault.
Import existing documents to the specified folder	Vault folder to import documents into that have the same name and revision as specified by the Property in the vault that identifies document revision and Database field that identifies revision options.
Property in the vault that identifies document revision	Select a property in the vault that identifies the document revision number of existing documents. In almost all cases, this should be the Revision Number – Versioning property. Cleared if Import files as new documents is enabled.
Database field that identifies revision	Select a field in the data source file that contains values in common with the vault documents to which the imported documents should become revisions. This should be a field that contains metadata like the document name, file name, document number, drawing number, and so on. Cleared if Import files as new documents is enabled.
Database field that contains the revision number	Select a field in the data source file that contains the revision number of the imported documents. The values in this field will be placed in the property chosen for Property in the vault that identifies revision , which identifies the document revision. Cleared if Import files as new documents is enabled.

Import Assemblies

The Meridian Enterprise **Assembly Import Wizard** can be used to import a variety of CAD assemblies into a vault. After you select the top level file of an assembly, the tool scans the file for links to other files that are referenced by the selected file. It then imports all of the files and creates Meridian Enterprise references that represent each link found.

Supported Formats

The **Assembly Import Wizard** supports the following CAD drawing formats:

- AutoCAD/Mechanical Desktop
- AutoCAD sheet sets
- AutoCAD Electrical projects
- AutoCAD Plant 3D projects
- Autodesk Inventor
- SolidWorks
- MicroStation

Notes about Functionality

- Importing an assembly that has circular references will create matching Meridian references correctly except for the returning references to the main assembly.
- The **Assembly Import Wizard** is not capable of importing assemblies that were last saved in an older version of Autodesk Inventor than is currently installed. For example, if the assembly was last saved in Autodesk Inventor 2011, and the installed version is Autodesk Inventor 2012, the assembly first needs to be migrated to Autodesk Inventor 2012, before the **Assembly Import Wizard** is capable of importing it. For assistance in automating this task with Meridian Enterprise, consult a System Administrator.
- The references that are created between Autodesk Inventor parts, assemblies, and drawings are influenced by the **SupportInventorDWG** registry value that is described in the HKEY_LOCAL_MACHINE\Software\Cyco\AutoManager Meridian\CurrentVersion\InventorLink article in the *Meridian Enterprise Administrator's Guide*.
- Before importing SolidWorks assemblies, disable the SolidWorks option **Search file locations for external references**.

- Before importing a large assembly or many smaller assemblies to a vault that has been configured to use local workspace, temporarily disable local workspace synchronization as described in [Configure Local Workspace](#) until the import is completed. The synchronization could interfere with the import and result in error messages like **The specified file cannot be opened**.
- AutoCAD sheet sets cannot be imported with 32-bit Windows 10.
- If the **Assembly Import Wizard** appears to have stopped working, it can actually be because another application that is used during the import has stopped and is showing messages that are hidden behind the visible windows. Minimize all visible windows to expose these messages, or use Alt-Tab to switch to the other application.
- To correct an imported assembly that does not have Meridian references, use the **Synchronize References from File** command as described in [Synchronize References](#).

Import an Assembly

To import an assembly:

1. If you want to create a new folder structure in the vault to contain the assembly, create it on your PC and copy or move the assembly files there before proceeding.

The **Assembly Import Wizard** can either recreate the existing assembly source folder structure in the vault or create a new folder in the root of the vault in which to recreate the source folder structure. You can move the files after you import them if you want to place them in a different location.

2. Start the **Assembly Import Wizard** program.

By default, it is located at `C:\Program Files (x86)\BC-Meridian\Program\BCAssemblyImport.exe`. The **Welcome to Assembly Import Wizard** wizard page appears and lists the types of assemblies that you can import.

3. Select an assembly type and click **Next**.

The **Assembly Location** page appears.

4. Click **Browse**.

5. Select the assembly that you want to import.

If you want to import all assemblies in the selected folder, select **Import Folder**.

6. Click **Next**.

The **Vault Location** page appears.

7. Click **Select**.

8. Select a vault for the destination of the assemblies.

If you want to create a new subfolder for the imported assemblies, type its name in the text box.

9. Click **Next**.

The **Manage Preferences** page appears.

10. Click options or type values using the descriptions in the following table.

Assembly import options

Option	Description
Raise new object events	Causes the VBScript events that are related to new document creation to occur. Select this option if you want the vault script to react to the imported assembly files the same as if the files were imported using other methods.
Import title blocks	Imports title block properties if they have been configured in the vault by a System Administrator.

11. Click **Next**.

The **Completing Assembly Import Wizard** page appears.

12. Click **Finish**.

The import status of each assembly is shown along with a progress bar while the files are imported.

When the import is finished, the results are shown on-screen and saved in the file `BCAssemblyImport.log` located in the same folder as the program. By default, this is `C:\Program Files (x86)\BC-Meridian\Program`. If any errors occurred during the import, you can click **Add to log** to append the error messages to the log file for later analysis.

13. Click **New Import** to repeat the process with a different assembly.

14. Click **Close**.

Open a Document From Within Meridian

You can open a document for editing from within Meridian if the document's source application is installed on your computer.

It is also very convenient to open vault documents from within their native application instead of from within Meridian Enterprise. For more information, see [Application Integration](#).

Troubleshooting

If the document opens in the source application as read-only even if the **Open read-only** option was not selected in the preceding task, there can be several reasons:

- The **Suspend viewing the document** option in PowerUser is not enabled as described in [Advanced Options](#).
- Due to inadequate network or server performance, the application did not detect that the viewer in PowerUser had released the file. If the situation persists, temporarily disable the viewer and reopen the file.
- The file is corrupted and needs to be repaired.

To open an AutoCAD drawing read-write so that it can be repaired:

1. Close the drawing.
2. Disable the viewer in PowerUser.
3. Reopen the drawing in AutoCAD.
4. Use the AUDIT command in AutoCAD to repair the file.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

If you attempt to open a document where the version in the vault is newer than the version in your local workspace, PowerWeb warns you that the document may contain updates from other users, and that any local changes may be lost after synchronization. You can then abort the operation. If you choose to abort the operation, nothing is changed in the local workspace or the vault.

To open a document for editing from within Meridian:

1. Choose one of the following options:

- Double-click the document name.
- In a navigation view:
 - a. Right-click the name of the document that you want to download.
 - b. Point to **Edit**, and then click **Open**.
- In the **Edit** ribbon, in the **Upload/Download** group, on the **Download Document** menu, click **Open**.
- View the document as described in [View Documents](#) and click **Open**.

If the document is under change by you in a workflow, it will open immediately. If not, a dialog will show the actions that are available to you.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **Edit** and then select **Open**.

2. Click options or type values using the descriptions in the following table.

3. Click **OK**.

A progress dialog box appears while the document is downloaded from the server to your computer where it opens in the Windows application that is registered for the file extension of the document.

PowerUser Procedures

Use these steps for [PowerUser](#).

To open a document for editing from within Meridian:

1. Choose one of the following options:

- Double-click the document.
- On the **Document** menu, select **Open in Application**.
- Click the **Open in Application** button in the Main toolbar. The icon on this button is different for each file type.
- Right-click the document to display the shortcut menu and then click **Open** or **Open With**.

If the document is under change by you in a workflow, it will open immediately. If not, a dialog will show the actions that are available to you.

2. Click options or type values using the descriptions in the following table.

3. Choose between three options:

- Click **OK** to perform the selected action.
- Click **Skip** to perform no action on the document named in the dialog title bar and proceed to the next document in the current batch, if applicable.
- Click **Cancel** to stop processing the selected documents.

Document Open Actions

Document open actions


Option	Description
None (don't save changes)	Opens the document in its application read-only. You will not be able to save any changes that you make. However, this is useful for viewing, printing, and other purposes and will not create a new revision of the document.
Start Quick Change	Checks the document out to you in a Quick Change workflow and opens the document in its application. If you have not been assigned the Start Quick Change privilege as described in the <i>Security Privilege Descriptions</i> article in the <i>Meridian Enterprise Configuration Guide</i> , this option is unavailable.
<TransitionName>	Executes the selected transition in the workflow that is configured for the document type, checks the document out to you, and opens the document in its source application. If you do not have the privilege to start a workflow, you are redirected to the document in Meridian Explorer.
You can enter a short comment in the document log...	Type a brief explanation as to why you are editing the document, the changes that you will make, or other comments that could be valuable to other users or for historical reference.
Apply to all documents	Applies the selected action and the typed comments to all documents in the current batch and you will not be prompted again.

View the Current Workflow

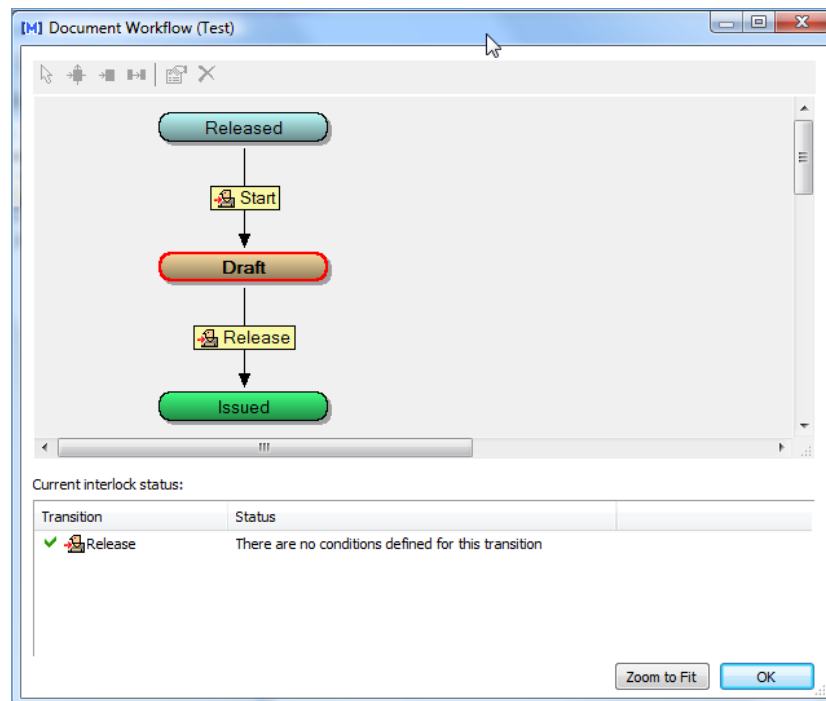
Viewing a document's current workflow information allows you to identify which workflow the document is in, its current status in the workflow, and the possible transitions to the next state in the workflow.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To view the current workflow:

1. Choose between two options:
 - On the document's **Document** property page, click the **Status** hyperlink.
 - In the view bar, click the **Workflow Diagram** icon .

The **Document Workflow** window or page opens.



Each state of the workflow appears as a colored rectangle. The current state of the document is boldly outlined in black. The names of workflow transitions (actions) are shown in white rectangles. Lines connect each transition from one state to another state. The direction of each transition is indicated by an arrowhead. In PowerWeb, you can hover the mouse pointer over a transition box in the diagram, the unrelated states and transitions are dynamically hidden.

If the current workflow type is a workflow definition, the outgoing transitions of the current state are listed at the bottom of the dialog with the current status of each one. If the Meridian Advanced Project Workflow Module is enabled, document workflow transitions may be interlocked with project workflow definitions. The status of these interlocks will also be shown in **Status**. The possible states of the interlocks are described in the following table.

2. To inspect complex workflows, use the zoom tools in the toolbar or scroll the mouse wheel.
3. Click and drag the diagram to pan.
4. Click **OK**.

Interlock statuses

Interlock Type	Status	Description
Document	There are no conditions defined for this transition	The transition is not interlocked with another workflow. You can attempt to run it but it might be blocked by a security check.
Document	This transition is filtered out by applied criteria	You cannot run the transition because it is blocked by an interlock with another workflow or a property value.
Document	There is no Metadata for this transition	The transition is not interlocked with another workflow, you can attempt to run it but it might be blocked by a security check.
Document	Transitions <Name> condition script failed.	You cannot run the transition because it is blocked by a script condition.
Document	Access Denied	You do not have sufficient rights to run the transition.
Project Folder	There are no conditions defined for this transition	The transition is not interlocked with another workflow. You can attempt to run it but it might be blocked by a security check.
Project Folder	Conditions have been validated for this transition	The script assigned to the transition has passed. You can attempt to run it but it might be blocked by a security check.
Project Folder	This transition is filtered out by applied criteria	You cannot run the transition because it is blocked by an interlock with another workflow or a property value.
Project Folder	Transitions <Name> preconditions script failed.	There is a problem with the script assigned to the transition. Contact a System Administrator.

Interlock Type	Status	Description
Project Folder	There is no Metadata for this transition	The transition is not interlocked with another workflow. You can attempt to run it but it might be blocked by a security check.
Project Folder	Transitions <Name> condition script failed.	You cannot run the transition because it is blocked by a script condition.
Project Folder	Interlock <Name>: Passed	Shown for each interlock that has been satisfied.
Project Folder	Access Denied	You do not have sufficient rights to run the transition.

Route a Document In a Workflow

Routing a document through a workflow produces a new revision of the document. Documents may be routed through one of three types of document workflows. A vault may use one or more of them for different purposes. Consult a System Administrator for the document workflow types configured for the vaults you use. For more information on document workflow types, see [Document Workflow Types](#).

Regardless of the types of workflow that may be configured for a vault, the available workflow transitions for each document depend on many rules. The workflow transitions available to you for any particular document depend on your security role for the folder in which the document resides. If you are starting a workflow, you may have more than one workflow available to you. If you are continuing a workflow, you may have more than one transition in the current workflow available to you. To view a diagram of the current workflow and other status information, see [View the Current Workflow](#).

Important!

Revoking a workflow deletes the copy of the document being changed in the workflow and reinstates the released revision of the original document as the highest revision. If the document was created new in the workflow, it is also deleted but there is no original document to reinstate so be certain that the document will not be needed or a backup copy is kept elsewhere before revoking the document's workflow.

Throughout a document workflow, the current status of the document, the next task to be performed, the person assigned to that task, and the person who initiated the workflow are all shown on the **Document** property page of each document in the workflow.

Routing batches of documents is only possible if:

- The documents are all in the same workflow state
- The documents are in different states of the same workflow, but transition equivalence has been configured for the transitions of all of the states that the documents are in. Transition equivalence is configured by a System Administrator. If any one of the documents in the batch does not have an equivalent transition, the entire batch will fail to be routed.

Notes About Functionality

- If rendering certain Revit files (.rvt) consistently leads to any error which does not seem applicable, check if opening the .rvt file in the Revit version installed on the render node causes an upgrade dialog to appear. If so, the file should be upgraded in an interactive Revit session before trying to render again.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To route a document:

1. Select the document that you want to route in a workflow.

The workflow transitions that are valid for the document's current status and document type appear in the **Workflow** ribbon.

2. Select a workflow transition from the **Workflow** ribbon or click **Reroute Documents**.

3. Choose one of the following options:

- If you select a Quick Change transition, a confirmation dialog box appears.
 - Click **Yes**.
- Otherwise, a dialog box appears for intermediate transitions.
 - a. Select a user name.
 - b. Type an optional comment to add to the document log.
 - c. Click **OK**.
- If your computer is configured to use a site cache, a confirmation dialog appears if this is the first time that you have used the site cache or you are working from a different computer than the last time that you used the site cache.
 - Click **Yes**.

The document's workflow properties are updated to reflect its current status. If the transition places the document under change by you, the document is downloaded to your local workspace for editing by you.

PowerUser Procedures

Use these steps for [PowerUser](#).

Important!

When a new revision is made of a document, any references to or from other documents will be updated to reference the new revision, not the original revision. This may have serious consequences for configuration management that may apply to your organization. If so, consider using **Replace Document** or **Derive Document** instead.

To route a document:

1. Select the document you want to route.
2. On the **Document** menu, point to **Document Workflow**, and then select a transition from the shortcut menu or click **Reroute Documents**.

Depending on the workflow type and the current state of the document, dialogs may appear to prompt you for more information.

3. Complete any dialog boxes that may appear and click **OK**.

If the vault is configured to generate workflow event notifications, email messages are sent to the persons to which the documents were routed and, optionally, to the workflow managers and to the subscribers of the documents. Event notifications that are generated as part of a batch operation are grouped together as a single email message.

The document is also added to the **Recent Items** list on the Windows **Start** menu for easy access.

Sign Documents

When you sign a document, Meridian verifies:

- Your identity with your Windows user account
- You are the current user logged on to the computer
- You are the current user logged on to Meridian

Meridian allows you to electronically sign multiple documents in a single batch. When signing the first document in the batch, you will be required to type both your user name and password. Depending on the system configuration, you will be required to type both your user name and password, or just your password, for each additional document in the batch.

As of the 2022 release, separate events are added to the audit log for each document in the batch, regardless of whether authentication succeeded, failed, or if you exited out of the authentication dialog without attempting to authenticate.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To sign documents:

1. Run the workflow transition that approves the documents as you normally would.
2. Complete any property pages that appear that are related to the transition.
The **<TransitionName>** dialog box appears showing the name and revision number of the document that you are about to sign.
3. Type your user name and password in **User name** and **Password**, respectively.
4. If appropriate, select a user name from the **Select a user to work on the documents** list.
5. Click **OK**.

Different results will occur depending on the outcome of the verification:

- If authentication passes, your electronic signature information is saved with the document in the vault. Depending on the system configuration, the information might also appear on a signature page attached to the document's rendition and if you click the **Electronic signatures** link in the **Workflow** group on the **Document** property page.
- If authentication fails, you are logged out of PowerWeb.

Both successful and unsuccessful electronic signature attempts are logged in the audit log. A separate event will be logged for each document in the batch.

Document Properties

Meridian stores and displays data about each document called *metadata*. The metadata is stored in *properties*, which can be considered database fields. Meridian uses properties in a manner similar to the way Windows keeps track of a file's name, size, date created, and date modified. The properties in Meridian are used to track and manage the documents and may include such properties as **Revision Number**, **Project Number**, **Status**, **Title**, and many more. The document type of a document determines which properties are associated with the document.

You will encounter three kinds of properties when working in Meridian:

- **Read-only** — You cannot change the values of these properties. Examples are **Creation Time** and **Size**.
- **Restricted** — You can only select a value from a list of standard values.
- **Unrestricted** — You may type a value you want.

Meridian displays properties on property pages. Each property page contains properties that are related to one another in some way. The document type of a document determines which property pages are associated with the document. Every vault document displays at least a **Document** property page that contains basic metadata such as workflow **Status**, **To-Do**, **Location**, **Type**, and so on. Property pages appear for existing documents and may also appear when you create new documents so that you can type any known information. That information may be used to automatically name the document and store it in the correct folder.

View And Edit Properties

For most purposes, you can view the properties of a document on the property pages that are described in [Property Pages](#). If you have the appropriate privilege, you can also view the same properties plus advanced information and hidden properties.

Editing properties is important to keep the values accurate for effective searching. Without accurate metadata, searching for documents can result in finding the wrong documents or no documents at all.

Important!

PowerWeb is limited to sending a total of 24 KB of data when properties are edited. This limit can be exceeded if the document type includes a large number of text properties or one or more memo properties that contain a lot of data. When this occurs, you will be shown an **Invalid arguments** error and your changes in some properties may not be saved correctly. If this happens to you, contact a System Administrator for help.


Notes about Functionality

- Your ability to edit properties is determined by the document's current workflow status, your security privileges, and the vault configuration. In most cases, you will only be able to edit properties while a document is under change by you.
- If the properties that you want to edit are for an AutoCAD drawing that contains multiple layouts that represent separate drawing sheets, each with a title block, a special property page titled **Title Blocks** may be available if it is enabled by a System Administrator. This page lets you enter different values for the title block in each layout (PowerUser only).
- If the same property appears on multiple pages and you change its value on only one page, only the value from the last page shown will be saved.
- To edit the properties that control rendition generation, see [Edit the Rendition Properties](#).

Edit Document Properties

Use these steps for [PowerUser](#) and [PowerWeb](#).


To edit the properties of a document:

1. Select the document that you want to change.
2. If the **Document** page is not visible, click the **Document** icon  in the view bar.
3. Click the tab to show the property page that contains the property that you want to edit.

4. Click **Edit**.

The properties become editable.

5. Change the value of the properties by typing text, selecting values, or selecting check boxes.

Properties that require you to set a value are indicated by a red triangle .

6. Click **OK**.

(PowerWeb) View Advanced Document Information and Hidden Properties

Use these steps for [PowerWeb](#).

To view a document's advanced information and hidden properties:

1. On the **Document** property page of the document, click the document icon in the upper-left corner of the page.

The **Advanced** and **Stored Properties** tabs appear.

You cannot edit properties on these pages.

2. Choose one or more of the following options:

- Click the **Advanced** tab to show the advanced information.
- Click the **Stored Properties** tab to show all properties of the document grouped by property set.
- To see the properties in a property set, click the expand icon next to the property set name.
- If a column isn't wide enough to show all of a property value, double-click the column heading to expand it.

(PowerUser) View Advanced Document Information and Hidden Properties

Use these steps for [PowerUser](#).

To view a document's advanced information and hidden properties:

- On the **Document** property page of the document, click the document icon in the upper-left corner of the page.

The **Advanced Document Information** dialog box appears. You cannot edit properties in this dialog box.

Compare Document Property Values


Comparing property values allows you to easily see the differences between the property values of two similar documents. It also allows you to update the property values in custom property sets of one of the documents with the values of the other document. You cannot update internal property values.

Note:

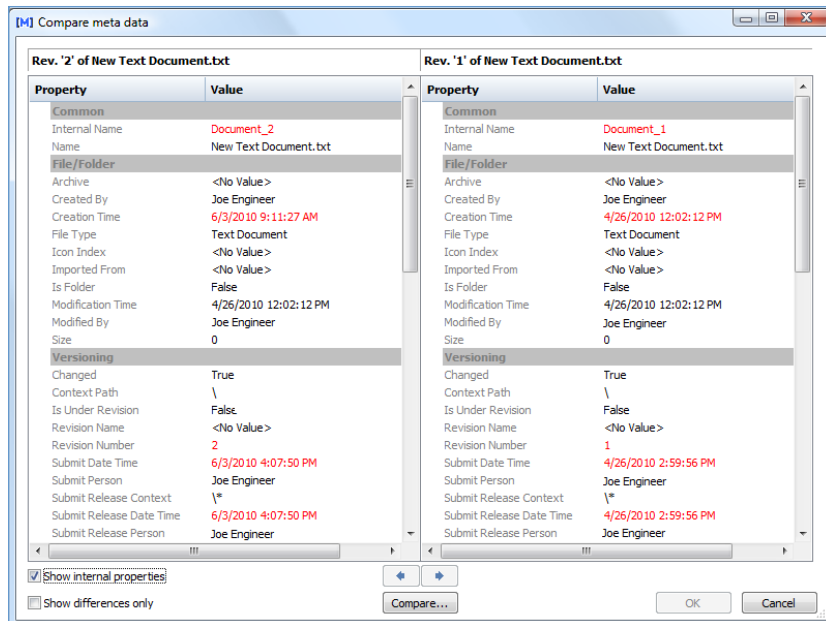
To update property values requires the **Set Property Value** privilege.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To compare document property values:

1. Select two documents and open the **Compare** dialog as described in [Compare Files](#).
You can open the **Compare Property Values** dialog immediately by pressing the **Ctrl** key while clicking the **Compare** button .
2. In the **Compare** dialog, click **Compare property values**.

The **Compare Property Values** dialog box appears similar to the following figure.



The names and revision numbers of the selected documents are shown at the top of the dialog box so that you can distinguish between the two documents. The names of each property used by the documents appear in the **Property** column below each document grouped by property sets, which appear as shaded rows.

Properties that have the same value for both documents appear in black text in the **Value** column. Property values that are different between the two documents appear in red text. Properties that are empty display **<No Value>**. By default, only the properties in the Custom property set are shown.

3. To show the properties contained in the internal property sets, select **Show internal properties**.
4. To show only the properties that are different between the two documents, select **Show differences only**.
5. To update the property of one document with the property value of the other document:
 - a. Select the check box next to the property value that you want to apply.
 - b. Click the arrow button that points to the document to which you want to apply the selected value.

The value is applied to the other document and the text color changes to black to indicate that the property values are identical.

The validation settings of custom properties are not evaluated when properties are updated this way.

6. Click **OK** to close the **Compare Property Values** dialog.

Synchronize File Properties

File and title block properties can be synchronized between the document and its property pages in the vault. This is useful for several purposes:

- Filling in some or all document properties when new documents are created
- Adding data to the Meridian properties when text is typed in empty properties
- Keeping the properties synchronized when changes to either are made (PowerUser client only)

Synchronization occurs automatically when a document is opened in its native application with one of the Meridian application links loaded. This synchronization is from Meridian to the document. This ensures that any changes made to Meridian properties are reflected in the document properties. Synchronization also occurs automatically when a document is saved in its native application. This synchronization is from the document to Meridian. This ensures that any changes made to the document properties are reflected in the Meridian properties.

Meridian properties can be updated from document properties when:

- Documents are imported into a vault
- Documents are uploaded with PowerWeb

File properties can be updated when documents are:

- Created new from a template or by using the Meridian **Copy**, **Derive**, or **Replace** commands
- Routed to a different state in a document workflow
- Checked out with PowerWeb

This topic pertains to the standard Windows file properties (**Title**, **Subject**, and so on, viewable in Windows Explorer) as well as to the proprietary properties that are provided by some applications. These properties are called various names depending on the application, for example, AutoCAD attributes and MicroStation tags. Each of the application links described in this chapter supports these proprietary properties except the Lotus Notes link.

Notes About Functionality

- If you insert a Word field and link it to a Word property that is itself linked to a Meridian property, the field will also show the value of the Meridian property. This requires that the properties are mapped to one another in the vault configuration by a System Administrator. However, this synchronization is only in one direction from the Word property to the Word

field. Changes to the field will not be synchronized to the Meridian property.

- Due to limitations in Revit, properties cannot be synchronized automatically.
- Blocks with mtext entities that are mapped to the drawing custom properties are not updated.
- The events upon which synchronization occurs automatically are configured by a System Administrator.
- A System Administrator may configure some Meridian properties as read-only or write-only so that synchronization only occurs in one direction. For example, the revision number in a title block may only be able to be updated *from* Meridian, but not *to* Meridian.
- We recommend you close files in AutoCAD or synchronize files from within AutoCAD. With some versions of AutoCAD, synchronizing properties with some AutoCAD files—such as sheet set files—while the file is open in AutoCAD can produce an error.
- Meridian uses Autodesk Inventor itself to update properties. Because Meridian will start and close Autodesk Inventor for each document, this will add a significant delay to actions that involve multiple documents, for example releasing an entire assembly.

To improve performance significantly, launch Autodesk Inventor and keep it running in the background before starting the update.

- Microsoft Office versions 2007 and higher allow you to save files to older version formats (97 - 2003) that use different file extensions (.doc, .xls, and so on) than the newer format (.docx, .xlsx, and so on). When files are saved in the old format, the Office application link does not work as expected because it is registered with the default file extensions that are created by the new applications. The workaround to this problem is to add the old file extensions to the Windows registry in the following key:

```
HKEY_CLASSES_ROOT\CLSID\{6D61257C-66B5-4210-B963-2C15F9BC44DE}\SupportedDocTypes
```

PowerWeb Procedures

Use these steps for [PowerWeb](#). Synchronization can be applied to AutoCAD, MicroStation, and Microsoft Office files only. References can be synchronized from different file types.

The **Properties from File** action triggers the publishing job configured for the **Read title block properties** setting. The **Properties to File** action triggers the publishing job configured for the **Write title block properties** setting. Both settings are described in *Configure a Vault For Publisher* in the *Meridian Enterprise Configuration Guide*.

Properties from File

To manually update the Meridian property pages from a document:

- In the **Document** ribbon, in the **Title Block** group, click **Properties from File**.

Properties to File

To manually update the properties of a document from its Meridian property pages:

- In the **Document** ribbon, in the **Title Block** group, click **Properties to File**.

PowerUser Procedures

Use these steps for [PowerUser](#).

The **Properties from File** action triggers the publishing job configured for the **Read title block properties** setting. The **Properties to File** action triggers the publishing job configured for the **Write title block properties** setting. Both settings are described in *Configure a Vault For Publisher* in the *Meridian Enterprise Configuration Guide*.

Properties from File

To manually update the Meridian property pages from a document:

- In the **Document** menu, point to **Synchronize**, and then click **Properties from File**.

Properties to File

To manually update the properties of a document from its Meridian property pages:

- In the **Document** menu, point to **Synchronize**, and then click **Properties to File**.

Other Applications

The following procedures apply to other linked applications other than Lotus Notes.

The **Synchronize Properties from File** action triggers the publishing job configured for the **Read title block properties** setting. The **Synchronize Properties to File** action triggers the publishing job configured for the **Write title block properties** setting. Both settings are described in *Configure a Vault For Publisher* in the *Meridian Enterprise Configuration Guide*.

Properties from File

To manually update the Meridian property pages from a document:

- Depending on the application, on the **Meridian** menu, in the **Meridian** ribbon, or in the **Meridian** toolbar in the native application, click **Update Vault** or **Synchronize Properties From File**.

You may also type **AMMUPDATE** at the AutoCAD command line.

Properties to File

To manually update the properties of a document from its Meridian property pages:

- Depending on the application, on the **Meridian** menu, in the **Meridian** page of the ribbon, or in the **Meridian** toolbar in the native application, click **Update Document** or **Synchronize Properties to File**.

You may also type **UPDATETITLE** at the AutoCAD command line.

Set a Property Value

Set Property Value is a very powerful command intended for use by System Administrators only. It is available only if you have the **Change Properties** and **Set Property Value** privileges as described in the *Security Privilege Descriptions* article in the *Meridian Enterprise Configuration Guide*.

It is useful for several purposes:

- To set the value of a property that is not visible on a property page and therefore cannot be set manually otherwise.
- To set the value of a property for many documents at one time, such as after importing a batch of documents for which the data was not available for import.
- To copy the value of one property to another.
- To calculate the value of a property based on the values of other properties.

(PowerWeb) Set Property Value for a Batch of Files

Use these steps for [PowerWeb](#).

This command only functions if your search results contain less than 100,000 files.


To set a property value for a batch of files:

1. [Conduct a search](#).
2. Select the **Search Results** heading.
This will apply the command you select to all results in your search, including results on subsequent pages.
3. Select the **Set a Property Value** command from the **Edit** tab.
4. Follow steps 3-8 in the *Set a Property Value* procedures below.
If the **Set a Property Value** command is applicable for all files in the search results, the operation succeeds. Otherwise, the system will execute the command for the files where the command is applicable.

Set a Property Value

Use these steps for [PowerUser](#) and [PowerWeb](#).

To set a property value:

1. Select the documents for which you want to set the property value.
2. Choose one of the following options:
 - On the **Edit** ribbon, in the **Organize** group, click **Set Property Value**.
 - Right-click a selected document, then select **Edit > Organize > Set Property Value**.
The **Set Property Value** dialog box appears.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Edit > Organize > Set Property Value**.
3. Select the property that you want to set from the **Property** list.
4. Select one of the options in the **Set to** group and then specify a value for that option using the descriptions in the *Property Value Options* section below.
5. Click the **Add to List** icon  to add your property specification to the property list.
To prevent setting a specified property, deselect it in the **Property** list.
6. Repeat steps 3 to 5 for each property that you want to set for the selected documents.
7. Enable the **Ignore validation rules** option, if desired.
8. When you are ready to set all of the specified properties, click **OK**.


The specified properties are updated for the selected documents.

In PowerWeb, a log of actions is shown. Each document name is a link for navigating to problem documents. The log can be copied to the clipboard for pasting into other applications.

Property Value Options

Set Property Value options

Option	Description
Property	If you select a property that uses a lookup list, the available values will appear as a list of the Fixed value option. The list of available properties is configured by a System Administrator as described in the <i>Configure Column Layouts</i> article in the <i>Meridian Enterprise Configuration Guide</i> .

Option	Description
Fixed value	Type or select the value that you want to set in the property selected for Property .
Value of property	Select a different property than you selected for Property , the current value of which you want to set in the selected property.
Script expression	Type a VBScript expression to calculate the value that you want to set in the selected property. Click the Meridian Script Editor button (if available)  to display the Meridian Script Editor dialog to help you build and validate an expression. For information on using VBScript for configuration expressions including their limitations, see the <i>Configuration Expressions</i> article in the <i>Meridian Enterprise VBScript API Reference</i> .
Ignore validation rules	Enable this option to bypass any lookup list and input restriction rules configured for the property. This option is only available for users with the Advanced Set Property Value privilege described in the <i>Vault Privileges</i> section of the <i>Security Privilege Descriptions</i> article in the <i>Meridian Enterprise Configuration Guide</i> .

Copy Commands

Meridian provides various commands for copying documents to create new revisions or versions. Each command behaves differently with respect to:

- Revision numbers of the source and copied documents
- References between the source and copied documents
- References to and from the source document and other documents such as subassemblies and parts
- Workflow status of the source document after the copy is made

Each can be useful in different situations depending on the document being copied, the purpose of the copied documents, and your organization's engineering change process.

The following table summarizes the differences between the Meridian copy commands on the source and copied documents to help you understand which command to use in your particular situation.

Copy commands comparison

Command	Revision Number of Copy	Status of Source	References to/from Source	Reference Between Source and Copy
Initiate a document workflow	Incremented before or after the workflow	Unchanged	Redirected to the copy (new revision)	None
Copy, Copy Document, Copy Multiple, Paste, and Paste Multiple	Unchanged	Unchanged	Unchanged	None
Copy with References	Unchanged	Unchanged	Copied to the copy	None
Derive Document	Unchanged	Unchanged	Unchanged	Derived From / Derived To
Derive with References	Unchanged	Unchanged	Copied to the copy	Derived From / Derived To

Command	Revision Number of Copy	Status of Source	References to/from Source	Reference Between Source and Copy
Replace Document	Incremented	Retired	Redirected to the copy	Replaced By / Replacement For
Create Project Copy	Unchanged	Unchanged	Copied to the copy	Master Project Copy

Copy a Document

Copying an existing vault document creates a new document with the same file content as the original. The metadata of the original document is also copied to the new document, including the revision number. However, references to and from the original document are not copied to the new document. To also copy the references, use the **Copy with References** command and see [Duplicate References](#).

For a comparison of the various copy commands, see [Copy Commands](#).

If the document type of the copies is not configured to calculate the file name, the file names of the new documents are set to *Copy of <OriginalFilename>*. Otherwise, the new documents receive newly calculated file names. No references are made to the original documents such as is created by the **Derive Document** and **Replace Document** commands.

If the document type is configured to use a document type workflow, the new documents are automatically placed under change to you.

Note:

The **Paste Multiple** command creates just one copy of the source document regardless of the number of copies that you specify. Each subsequent copy is made from the previous copy. This might produce unexpected results depending on any configuration or customization of the source document type when copies are made. If this produces unacceptable results, use the **Copy Document** command multiple times or consult a System Administrator.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Copy Existing Documents Once

To copy existing documents once:

1. Select the source documents that you want to copy.
2. Choose one of the following options:
 - On the **Edit** ribbon, in the **Copy** group, click **Copy**.
If the document type of the original document has been configured to show property pages for the **Copy Document** command, the pages are shown with the original document's property values as defaults.
 - Right-click the selected document, and select **New > Copy > Copy**.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **New** and select **New > Copy > Copy**.
- 3. If necessary, type or change property values for the new document and click **OK**.

A new document is created in the current folder with the same file content as the original document.

Copy Existing Documents Multiple Times

To copy existing documents multiple times:

1. Select the source documents that you want to copy.
2. Choose one of the following options:
 - On the **Edit** ribbon, in the **Copy** group, click **Copy Multiple**.
 - Right-click the selection and select **New > Copy > Copy Multiple**.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **New** and select **New > Copy > Copy Multiple**.
3. In the **Add Document / Select Folder** dialog box that appears, select the folder where you want the copies.
4. Click **Next**.

If the document type of the original document has been configured to show property pages for the **Copy Document** command, the pages are shown next for the first copy with the original document's property values as defaults.
5. In the **Copy Multiple** dialog box that appears, enter the **Number of copies** you want.
6. Click **OK**.

The documents are copied to the chosen folder.

PowerUser Procedures

Use these steps for [PowerUser](#).

Copy Existing Documents Once

To copy an existing document once:

1. Select the source document that you want to copy.
2. On the **Edit** menu, select **Copy Document**.

If the document type of the original document has been configured to show property pages for the **Copy Document** command, the pages are shown with the original document's property values as defaults.

3. If necessary, type or change property values for the new document and click **OK**.

A new document is created in the current folder with the same file content as the original document.

Copy Existing Documents Multiple Times

To copy an existing document multiple times:

1. Select the source document that you want to copy.
2. On the **Edit** menu, select **Copy** or press Ctrl + C.
3. Select the folder where you want to create the copies of the document or select a document in that folder.
4. On the **Edit** menu, select **Paste Multiple**.

The **Paste Multiple** dialog box appears.

5. Type the number of copies that you want to make and click **OK**.

If the document type of the original document has been configured to show property pages for the **Copy Document** command, the pages are shown with the original document's property values as defaults.

6. Type or change property values for the first copy.
7. If you want to apply the same property values to the remaining copies, select **Apply for all other documents of this type**.
8. Click **OK**.

The copies are created in the current folder with the same file content as the original document.

Derive a Document

Deriving a document is the same as copying a document except that a reference is made to the original document so you can easily locate the origin of the derived document. The revision number of a derived document is not incremented. References to and from the original document are not copied to the new document. To also copy the references, use **Derive with References** and see [Duplicate References](#). You may derive new documents only from existing released documents.

Unlike a new revision (created by a document workflow) or a replaced document in which references to its source document are updated to refer to the new revision, references to the source of a derived document are not updated to refer to the derived document. This can be important if you need to maintain the existing configuration of references between assemblies, subassemblies, and parts.

Another difference between the **Derive Document** and **Replace Document** commands is that derived documents are not retired, but replaced documents are retired and may not be revised again unless they are unretired.

For a comparison of the various copy commands, see [Copy Commands](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Derive New Document from Existing Document

To derive a new document from an existing document:

1. Select the source document that you want to copy.
2. On the **Edit** ribbon, in the **Copy** group, click **Derive**.

If the document type of the original document has been configured to show property pages for the **Copy Document** command, the pages are shown with the original document's property values as defaults.

3. If necessary, type or change property values for the new document and click **OK**.

A new document is created in the current folder with the same file content as the original document.

View Reference

To view the reference:

1. Select either the derived document or its original document.
2. On the **Document** ribbon, in the **Information** group, click **Show References**.
The **References** page appears. For descriptions of the features of this page, see [View References](#).
3. Select either the **Derived from** or **Derived to** reference type from the **Show reference type** list.

PowerUser Procedures

Use these steps for [PowerUser](#).

Derive New Document from Existing Document

To derive a new document from an existing document:

1. Select the source document for the derived document.
2. On the **Edit** menu, select **Derive Document**.
If the document type of the original document has been configured to show property pages for the **Derive Document** command, the pages are shown with the original document's property values as defaults.
3. If necessary, type or change property values for the derived document and click **OK**.
A new document is created in the current folder with the same file content as the original document.
If the document type is not configured to calculate the file name, the file name of the new document is set to *Copy of <Originalfile name>*. Otherwise, the new document receives a newly calculated file name.
A reference is made from the original document to the derived document with the reference type **Derived To**.

View Reference

A reference is made from the original document to the derived document with the reference type **Derived To**.

To view the reference:

1. Select either the derived document or its original document.
2. On the **Document** menu, click **Show Derivatives**.

The **Derivatives** dialog box appears. For descriptions of the features of this dialog, see [View References](#).

If the document type is configured to use a document type workflow, the new document may be automatically placed under change to you. The status of the original document is not changed.

Replace a Document

Replacing a document is the same as copying a document except that a reference is made to the original document so that you can easily locate the origin of the replacement document. The **Status** of the original document is changed to **Retired** and it may not be revised again unless it is unretired. The revision number of the replacement document is also incremented. If a document needs to be replaced, it should be in an editable workflow state on the user's to-do list.

Unlike a new revision (created by a document workflow) in which references to its source document are updated to refer to the new revision, references to the source of a replacement document are not updated to refer to the replacement document. This can be important if you need to maintain the existing configuration of references between assemblies, subassemblies, and parts.

The difference between the **Derive Document** and **Replace content** commands is that derived documents are not retired but replaced documents are retired and may not be revised again unless they are unretired.

For a comparison of the various copy commands, see [Copy Commands](#).

Notes about Functionality

- If the document type is not configured to calculate the file name, the file name of the replacement document is set to *Copy of <OriginalFilename>*. Otherwise, the replacement receives a newly calculated file name.
- A reference is made from the original document to the replacement document with the reference type **Replaced By**. To view the reference, see [View References](#).
- If the document type is configured to use a document type workflow, the new document may be automatically placed under change to you.
- When you open a document in Autodesk Inventor, AutoCAD, MicroStation, or SolidWorks and the document has references to other documents that have been replaced with the **Replace content** command, you will be prompted to update the document to refer to the replacements. The appropriate Meridian application link must be installed.
- You cannot use the **Replace content** action to replace documents in a batch.

PowerWeb Procedures

Use these steps for [PowerWeb](#). You cannot use the **Replace content** action to replace documents in a batch.

To replace a document:

1. Select the document that you want to replace.
2. Choose between two options:
 - On the **Edit** ribbon, in the **Upload** group, click **Replace**.
If the document type of the original document has been configured to show property pages for the **Replace content** command, the pages are shown with the original document's property values as defaults.
 - From the context menu:
 - a. Right-click the selected document.
 - b. Select **New > Copy > Replace**.
3. If necessary, enter or modify property values for the new document.
4. Click **OK**.

A replacement document is created in the current folder with the same file content as the original document.

PowerUser Procedures

Use these steps for [PowerUser](#).

To replace a document:

1. Select the document you want to replace.
2. On the **Edit** menu, select **Replace Document**.
If the document type of the original document has been configured to show property pages for the **Replace Document** command, the pages are shown with the original document's property values as defaults.
3. If necessary, type or change property values for the replacement document and click **OK**.

A replacement document is created in the current folder with the same file content as the original document.

Duplicate References

The **Copy with References**, **Derive with References**, and **Create Project Copy** commands can duplicate the Meridian references to and from a source document to the new document. Alternatively, the referenced documents themselves can also be copied by the commands. These commands use the Reference Explorer to help you see the documents with references to and from the source document and to decide which references and/or documents to copy. This can be useful if you want to create a new assembly or sub-assembly based on an existing document and want to retain the references to existing subassemblies and parts or copy them also.

The default action of the commands can be either to create and reference copies of the original assembly or to only reference the source assembly documents. This action is configurable by a System Administrator for each document type. Your ability to override the default action (for example, by selecting a referenced document for copying when the default action is to reference the source document) is controlled by a security privilege that is part of your security role for the source document folder. Likewise, referenced documents that are under change in a document workflow cannot be copied and will display an error message.

By default, the **Copy with References** and **Derive with References** commands are only available for AutoCAD, Autodesk Inventor, SolidWorks, and MicroStation files. Additional file types can be enabled with the **ExtForDuplicator** value of the following registry key on your computer:

[HKEY_LOCAL_MACHINE\Software\Cyco\AutoManager
Meridian\CurrentVersion\Client](#)

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To duplicate references:

1. Select the document that you want to copy.
2. Choose one of the following options:
 - From the **Edit** ribbon:
 - a. In the **Copy** group, click the arrow ▼ next to **Copy**.
 - b. Click **Copy With References** or **Derive With References**.
The page refreshes to show only the selected document and its references.
 - Right-click the document, point to **Copy** and then select **Copy with References** or **Derive with References**.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **New** and then select **Copy with References** or **Derive with References**.
- 3. If the document that you selected is a CAD assembly, in the **Assembly** ribbon, select options in the **Options** group to show additional references as described in the following table.

In the **Folder Structure** group, select the option for how you want a folder structure created for the referenced documents as described in the following table.

By default, all of the related documents are selected for the copy operation. If you have the privilege to override the default, you can toggle the **Select for Copy** ✓ option to **Select Entire Branch for Copy** ✓ or to **Use Original** = for any documents that you do not want to copy.
- 4. When you have finished selecting documents, click **Start Copy**.

The **Copy with references** dialog shows the reference structure of the documents that will be copied.

If the document type of the source document or its referenced documents has been configured to show property pages for copy commands, the pages are shown with the original document's property values as defaults.
- 5. Type or change property values for the document that is highlighted in the reference structure view.
- 6. If you want to apply the property values to all the referenced documents as well (assuming they are of the same type), enable **Apply for all documents of this type**.
- 7. Click **Next** or **Finish**.

If you did not enable **Apply for all documents of this type**, additional property pages will be shown for each reference to be copied. Documents with completed property pages are indicated with this icon ✓.

When all required property pages have been completed, a new document is created in the current folder with the same file content and references as the original document. If the default action is configured to create copies of referenced documents, copies of them are created also. The **Operation Log** panel shows the result of the copy process.
- 8. When you are finished making copies, enable **Go to copied assembly** if you want to work on the copy next, and then click **Close**.

PowerUser Procedures

Use these steps for [PowerUser](#).


To duplicate references:

1. Select the document that you want to copy or derive from.
2. Select the appropriate copy command depending on whether or not you want a reference made between the original and new documents or you want to create a project copy.

The **Select Folder** dialog box appears.

3. Select a destination folder for the new document and click **OK**.

The Reference Explorer appears, listing the original document and the other documents that either reference or are referenced by the original document. The entire assembly structure can be displayed by expanding each referenced document. For information on using the Reference Explorer, see [Reference Explorer](#).

4. To configure command options, click the **Options** button .

The **Assembly Copy Options** dialog box appears.

5. Select options using the descriptions in the following table and click **OK**.
6. In the Reference Explorer, select (highlight) the documents for which you want to copy references and/or documents and click **OK**.

If you do not have the privilege to override the default action, selected documents will display a red X icon nearby.

Hold down the Ctrl key and click to select additional documents. Hold down the Shift key and click to select a range of documents.

If the document type of the original document or its referenced documents has been configured to show property pages for the **Copy Document** command, the pages are shown with the original document's property values as defaults.

7. If necessary, type or change property values for the new document and click **Next** or **Finish**.

A new document is created in the selected folder with the same file content and references as the original document. If the default action is configured to create copies of referenced documents, copies of them are created also.

Assembly Copy Options

Assembly copy options

Option	Description
Display manual references	Shows references that were created manually as well as those created automatically by the CAD application links.
Display inactive project copies	Along with active project copies, also show project copies that have been released as new master revisions, have been superseded by the master document, or have been merged with the master document.
Copy drawing and presentation documents	Copies any Autodesk Inventor presentation documents related to the selected model. Enabled by default.
Include connecting assemblies	Copies the parent and child referenced documents in addition to the selected document. If disabled, references from the selected document remain connected to the master documents. Enabled by default.
Rebuild folder structure relative to the main assembly	Builds a folder structure to contain the referenced documents. It is built in the selected folder relative to the main assembly. This is the default option.
Rebuild folder structure relative to each subassembly	Builds a folder structure to contain the referenced documents. It is built in the selected folder relative to each sub-assembly.
Do not rebuild folder structure	Does not build new folders to contain the referenced documents.



Meridian Clipboard

When you need to copy or move multiple items, PowerWeb provides a clipboard to make these tasks easier. The clipboard works similar to the Windows clipboard except that it doesn't contain a copy of the items' content. The clipboard remembers the items that you have added to it regardless of your current view of the vault.

You can cut (move) or copy items to the clipboard from one location and then paste them into a different location. Each time you place items on the clipboard, its previous contents are cleared so that you can start over with a different set of items.

To copy or move items using the clipboard:

1. In any navigation view, select the items that you want to move.
2. Choose between two options:
 - In the **Vault** ribbon, click **Cut to Clipboard** or **Copy to Clipboard**.
 - In the shortcut menu, expand **Vault** and then click **Cut to Clipboard** or **Copy to Clipboard**.

The current contents of the clipboard, if any, are cleared and the selected items are placed on the clipboard. A corresponding icon appears in the navigation view to the left of the name of each item on the clipboard, whether cut  or copied .

A clipboard icon appears in the toolbar and indicates how many items are on the clipboard.

3. Navigate to the location where you want to copy or move the items to.
4. Choose between two options:
 - In the **Vault** ribbon, click **Paste from Clipboard**.
 - In the shortcut menu:
 - a. Expand **Vault**.
 - b. Click **Paste from Clipboard**.

If the current view is a navigation view and not the **Folders** view, a folder selection dialog box appears.

- c. Select a destination folder and then click **OK**

If the document type of the source item has been configured to show property pages for the **Copy Document** command, the pages are shown with the source item's property values as defaults.

- d. If necessary, type or change property values for the items and click **OK**.

The items are copied or moved to the selected location depending on how they were placed on the clipboard.

- If you clicked **Cut to Clipboard** in step 2, they are moved to the folder selected in step 3.
- If you clicked **Copy to Clipboard** in step 2, they are copied to the folder with the same file content as the source items.

Change the Type Of a Document

Changing the document type of a document causes the document to take on all of the characteristics of the destination document type: its file naming convention, workflow, revision numbering, and so on. This is useful to transition a document from a pre-production phase to a production phase of its life cycle. Another example is to change a document with a normal document type to a hybrid document type.

Important!

If the document type you change to does not use the same properties as the original document type, you will lose access to that information.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To change a document's type:

- Choose one of the following options:
 - From the context menu:
 1. Select one or more documents.
 2. Right-click your selection, point to **Edit**, then **Organize**, and select **Change Document Type**.
The **Change Document Type** dialog box appears.
 3. Select a new document type.
If a scope is active, document types that are not enabled for that scope will not appear for your selection.
 4. Click **OK**.
The document type of your selection is changed. PowerWeb will return an error message for any documents in the batch that are locked.
 - From the ribbon:
 1. Select one or more documents.
 2. In the **Edit** ribbon, in the **Organize** group, click **Change Document Type**.
The **Change Document Type** dialog box appears.

3. Select a new document type.
If a scope is active, document types that are not enabled for that scope will not appear for your selection.
 4. Click **OK**.
The document type of your selection is changed. PowerWeb will return an error message for any documents in the batch that are locked.
- From [the Thumbnails view](#):
 1. Right-click a thumbnail of a document.
 2. Select **Edit > Organize > Change Document Type**.
 3. Select a new document type.
If a scope is active, document types that are not enabled for that scope will not appear for your selection.
 4. Click **OK**.
The document type of the selected document is changed.

PowerUser Procedures

Use these steps for [PowerUser](#).

To change a document's type:

1. Select the document that you want to change.
2. On the **Document** menu, select **Change Document Type**.
The **Select Document Type** dialog box appears.
3. Select a new document type.
If a scope is active, document types that are not enabled for that scope will not appear for selection.
4. Click **OK**.
The document type of the selected document is changed.
Because changing the document type of a document cannot be performed on locked documents, they will be automatically unlocked when the **Change Document Type** command is executed.

Delete and Undelete Documents and Folders

Deleting a document or folder removes it from view. However, it does not remove it permanently from the vault. The item can be restored to its original location, similar to restoring files from the Windows Recycle Bin. The difference is that Meridian does not store all deleted documents in one location but rather tracks deleted documents according to their parent folder.

Notes About Functionality

- Folders are deleted recursively by both PowerUser and PowerWeb, similar to Windows. This means that deleting a folder that contains sub-folders will also delete the sub-folders and the documents they contain. The confirmation dialog box shows how many child items would be deleted if the user proceeds.
- Folders and their contents are undeleted recursively by PowerUser but not undeleted recursively by PowerWeb. Undeleting a folder in PowerWeb only restores the folder, not its contents. You must undelete the child folders and documents individually.
- Deleted documents that have never been released in the vault cannot be undeleted. In other words, new documents cannot be undeleted until after they have been released at least once.
- References to deleted documents are not restored by **Undelete**.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Delete a Document or Folder

To delete a document or folder:

1. Choose one of the following options:
 - Right-click the document or folder that you want to delete, point to **Edit** and then click **Delete**.

A dialog box opens, asking you to confirm your choice.

- From the ribbon:
 - a. Select the document or folder that you want to delete.
 - b. In the **Edit** ribbon, in the **Organize** group, click **Delete**.
A dialog box opens, asking you to confirm your choice.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Select **Edit > Delete**.
A dialog box opens, asking you to confirm your choice.
2. Click **OK**.
- The document or folder is deleted.

Undelete a Document or Folder

To undelete a document or folder:

1. Choose one of the following options:
 - Right-click the folder from where the document was deleted, then select **Edit > Organize > Undelete**.
The **Deleted folders and documents** dialog box appears.
 - From the ribbon:
 - a. Select the folder from where the document was deleted.
 - b. In the **Edit** ribbon, in the **Organize** group, click **Undelete**.
The **Deleted folders and documents** dialog box appears.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Select **Edit > Organize > Undelete**.
2. Select the items that you want to undelete.
3. Click **Undelete**.
The items are restored.

PowerUser Procedures

Use these steps for [PowerUser](#).

Delete a Document or Folder

To delete a document or folder:

1. Select the document or folder you want to delete.
2. Choose one of the following options:
 - On the **Edit** menu, select **Delete**.
 - Right-click the item and select **Delete** on the shortcut menu.
 - Press Ctrl+D.
 - Press Delete.

You are prompted to confirm that you want to delete the item. If the item is a document and it has incoming references, you are prompted to confirm that you want to delete the document.

3. Click **Yes**.

Undelete a Document or Folder

To undelete a document or folder:

1. Select the parent folder of the item that was deleted.
2. On the **Document** or **Folder** menu, select **Undelete**.

The **Deleted Folders and Documents** dialog box appears, listing items that have been deleted from the selected folder but have not yet been purged from the vault.

3. Select the item you want to restore and click **Undelete**.
4. Click **Close**.

The item is restored to its original location.

Purge Documents And Folders

Deleted documents and folders are removed from view, but not permanently removed from the vault. To permanently remove a document or folder and all of its data so that it cannot be undeleted, you must purge it. A document or folder must first be deleted before it can be purged.

Important!

Purged documents and folders cannot be restored except by restoring the entire vault from backup. Doing so loses all changes made to the vault since the backup was made. Be absolutely certain that you want to proceed.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To purge a document or folder:

- Choose between two options:
 - From the context menu:
 1. Right-click the folder from where the document or folder was deleted, point to **Edit**, and then click **Undelete**.
The **Deleted folders and documents** dialog box appears listing items that have been deleted from the selected folder but have not yet been purged from the vault.
 2. Select the items that you want to purge and click **Purge**.
A dialog box opens, asking you to confirm your choice.
 3. Click **Yes**.
The items are purged from the vault.
 4. Click **Close**.
 - From the ribbon:
 1. Select the folder from where the document or folder was deleted.
 2. In the **Folder** ribbon, in the **Action** group, click **Undelete**.
The **Deleted folders and documents** dialog box appears.
 3. Select the items that you want to purge and click **Purge**.
A dialog box opens, asking you to confirm your choice.

4. Click **Yes**.
The items are purged from the vault.
5. Click **Close**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To purge a document or folder:

1. Select the parent folder of the document or folder that you want to purge.
2. On the **Folder** menu, select **Undelete**.
The **Deleted Folders and Documents** dialog box appears listing items that have been deleted from the selected folder but have not yet been purged from the vault.
3. Select the item that you want to purge and click **Purge**.
A dialog box opens, asking you to confirm your choice.
4. Click **Yes**.
The item is purged from the vault.


View Prior Revisions

If the vault is configured to maintain history, you can view the prior revisions of a document. If not, you can only view the current released revision and the copy in progress, if any.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To view the prior revisions of a document:

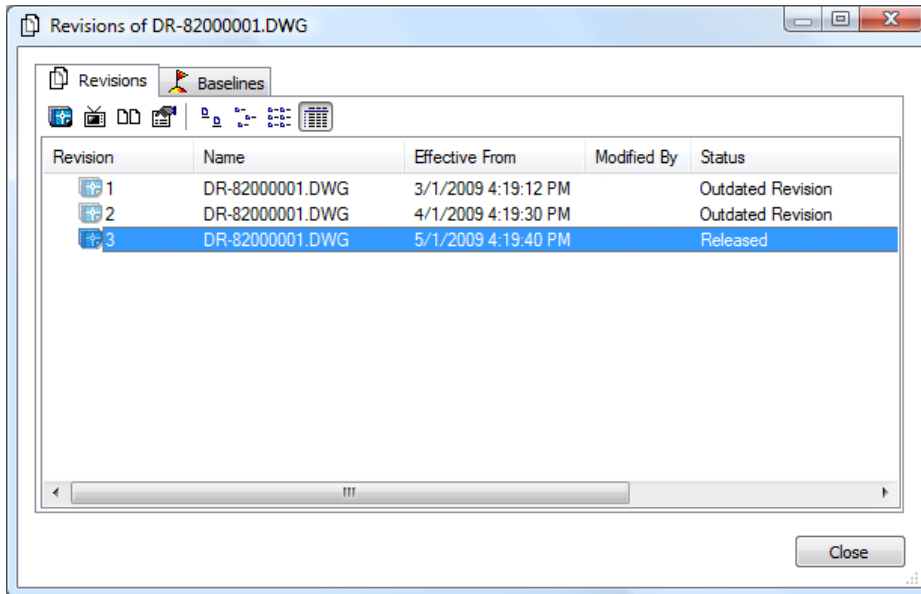
1. Choose between two options:
 - In the view bar, click the **Revisions** icon .
 - Select the document for which you want to view prior revisions.
2. In the **Document** ribbon, in the **Information** group, click **Show Revisions**.
The **Revisions** page of the document appears in the document pane.
3. Click a revision's name to view the selected revision of the document in a new browser tab.
Right-click a revision and select commands from the shortcut menu to perform various actions described in the *Shortcut Menu Commands* section below.

PowerUser Procedures

Use these steps for [PowerUser](#).

To view the prior revisions of a document:

1. Select the document for which you want to view prior revisions.
2. On the **Document** menu, select **Show Revisions**.
The **Revisions** dialog box appears, similar to the following figure. The **Revisions** tab lists the prior revisions of the selected document. The **Baselines** tab lists the existing baselines that include specific revisions of the document.



Note:


If a revision of a document has hybrid document parts attached to it, plus and minus (+ and -) symbols will appear to the left of the document name similar to those shown in Navigation views. You can click these symbols to expand or collapse display of the hybrid document parts. The revisions of the hybrid document parts that are shown are the revisions that were effective when the main document part was released.





3. Choose between two options:

- Select a revision and click a command button on the toolbar.
The available commands are described in the *Revisions Window Commands* section below.
- Right-click a revision and select a command from the shortcut menu.
The available commands are described in the *Shortcut Menu Commands* section below.

Revisions Window Commands

Revisions window toolbar buttons

Button	Command	Description
	Open in Application	Opens the selected revision in the application registered in Windows for the revision's file extension. The icon on this button is different for each file type. This example is for an AutoCAD drawing file. Prior revisions will be opened read-only.

Button	Command	Description
	View Document	Opens the selected revision in a new viewer window.
	Compare	Select any two revisions and click this button compare the revisions graphically. See also Compare Files .
	Properties	Opens a new window displaying the property pages of the selected revision. Prior revisions will be opened read-only.
		Display revisions as large icons, small icons, a list, or a detailed list, respectively.

Shortcut Menu Commands

Shortcut menu commands

Shortcut Menu Command	Description
Compare	Select any two revisions and click this button to compare the revisions graphically. See also Compare Files .
Revert to This Revision	Creates a copy of the selected revision as a new revision of the document, increments the revision number, and places the revision under change to you. In PowerUser you can revert to the latest released revision, but in PowerWeb you can only revert to an outdated revision. You cannot revert to an 'intermediate' revision that was created when a document was under change.
Restore This Part	Restores the selected revision of a hybrid document part to the current revision of the main document.

View Vault History

Viewing vault history allows you to see the contents of the vault as it existed at a specific moment in time: its documents, revisions, references, content, and so on.

PowerWeb Procedures

Use these steps for [PowerWeb](#). To access this feature, you must [enable viewing the vault at a baseline in your personal preferences](#).

This feature was added in the 2022 release.

To view vault history:

1. Click the **Now** filter to the right of the **Collections** menu.
A menu opens.
2. Select **Go to specific date or time**.
The **Go to Date/Time** window opens.
3. Use the fields to select the date and time you want to view.
4. Click **OK**.

The vault is opened to the date and time you selected. The **Now** filter is replaced with the date and time you selected, and the background of the page changes to a light gray to indicate you are viewing the vault in the past. All editing commands are disabled.

5. Choose between two options:
 - To return to viewing the vault in the present time:
 - a. Click the history filter.
This filter is labeled with the date and time you are currently viewing.
A menu opens.
 - b. Select **Now**.
The vault is returned to the present time.
 - To view another point in the past:
 - a. Click the history filter.
This filter is labeled with the date and time you are currently viewing.
A menu opens.
 - b. Follow steps 2-4 above.

PowerUser Procedures

Use these steps for [PowerUser](#).

To view vault history:

1. Click the current time context button in the context bar.
This button has a clock and the word **Now** on it.
The **Go to Date/Time** dialog box appears.
2. Select **Baseline** or set **Specific Date/Time** to the moment you want to view.
3. Click **OK**.

Create a Baseline

To create a baseline:

1. View the vault at the moment in time for which you want to create the baseline.

2. Click **Baselines** on the **Vault** menu.

The **Baselines** dialog box appears.

3. Click the **New** button .

A new baseline is added to the list.

4. Type a name for the baseline and press **Enter**.

5. Click **Close**.

You can now view this baseline at any time by selecting it either in the **Baselines** dialog or from the list shown by clicking the context button on the context bar.

Compare Files

To compare files, PowerWeb displays a unique viewing page that shows the renditions of the selected documents. The two files can be two revisions of the same rendition file or two similar but unrelated renditions that you want to compare visually. The page allows you to see either of the renditions alone or a simultaneous view of both renditions that displays the additions, deletions, and unchanged objects between the two files in symbolic colors:

- Green — additions
- Red — deletions
- Black — unchanged

To compare files, PowerUser displays a unique multi-pane window. Two of the panes show two files side-by-side. The two files can be two revisions of the same source or rendition file or two similar but unrelated files that you want to compare visually. The area of the files shown in the two panes are synchronized with one another. When you change the view of one file, the view of the other file is changed automatically to match the first file. This makes it easy to compare files without adjusting the views, sizes, and positions of separate windows.

If the files being compared are supported vector (CAD) graphics files, the lower-right pane shows the additions, deletions, and unchanged objects between the two files in configurable colors. The lower-left pane contains options to change the colors. This graphical representation of changes is valuable for quickly determining the differences between two complex files. You can print a hard copy of the differences and also generate a report of the non-graphical differences between two files, for example, layer names, system variables, and so on.

Note:

- Comparing source files is only supported by the AutoVue viewer (available separately). Comparing renditions is supported by the built-in PDFTron viewer or the AutoVue viewer (available separately).
- In Meridian 2021, comparing renditions using the built-in PDFTron viewer does not automatically recalculate the difference after you pan the document. To recalculate the difference, click **Refresh**.
- Graphics that have been moved but that are otherwise unchanged are considered by **Compare** as a deletion from one document and an addition to the other document.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To visually compare two renditions:

1. Select two documents that you want to compare.
2. Choose between two options:
 - Right-click one of the documents, point to **Document**, and then click **Compare Renditions**.
The **Compare Renditions** page appears.
 - In the **Document** ribbon, in the **Action** group, click **Compare Renditions**.
The **Compare Renditions** page appears.
3. Use the options of the page as described below.
4. Click **Exit**.


Compare Renditions page options

Option	Description
Keep in sync	When enabled and you switch from one rendition to the other, the viewing area remains the same so that you don't have to manually match the viewing area of one rendition to the other. When disabled, the viewing area is not synchronized so that you can easily view different areas of each rendition and switch between them.
Rev.<lowest>	Displays only the first rendition.
Rev.<highest>	Displays only the second rendition.
Difference	Displays both renditions simultaneously with the colors indicated by the legend in the bottom right corner of the page.
Refresh	Refreshes the current view to show any changes that have been made to renditions since you first opened the page.
Swap	Reverses the comparison order of the renditions.

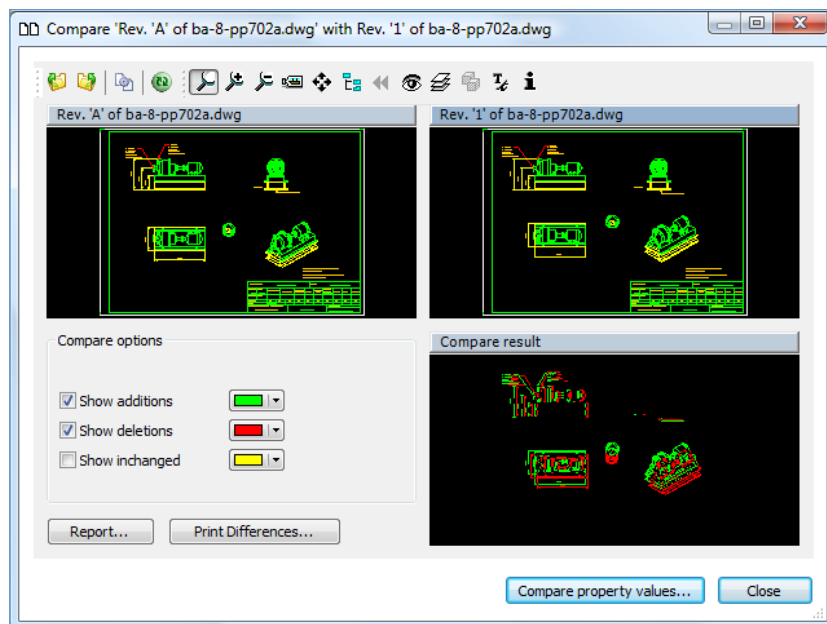
PowerUser Procedures

Use these steps for [PowerUser](#).

To visually compare two files:


1. Use Ctrl+click to select one of the following:
 - Two similar documents from a Navigation view
 - Two revisions of the same document from the **Revisions** dialog
 - One document in a briefcase to compare with its original in the vault. Meridian Enterprise will automatically select the original document
2. Click the **Compare** button .



The **Compare** dialog box appears, similar to the following figure.



3. Use the tools in the toolbar or the shortcut menu to change the view of the documents. All panes remain synchronized on the same area of the documents.

Note:

Automatic pane synchronization is not supported for all formats in all viewer plug-ins, for example, PDF by the AutoVue 2D Professional viewer plug-in. When working with an unsupported combination, click the **Synchronize**  button to manually synchronize the views.

Use the browse buttons   or corresponding shortcut menu commands to load different revisions of the same documents, different documents from the vault, or documents that reside outside the vault for comparison.

- Click options or type values using the descriptions in the following table.

Compare window options

Option	Description
Show additions	Displays graphics in the right document that do not exist in the left document. Select a color to display additions from the list.
Show deletions	Displays graphics in the left document that do not exist in the right document. Select a color to display deletions from the list.
Show unchanged	Displays graphics that are identical in both documents. Select a color to display unchanged graphics from the list.
Report	Displays a report of the invisible changes between the two documents. The information can be saved to a file where it can be printed. Not available for raster documents. This option is only available if the current viewer is the ICViewPlugin viewer.
Print Differences	Prints the graphics in the Compare Result pane to a printer.
Compare property values	Compares and optional updates the property values of one document with the property values of another document. To compare the property values of the two documents, see Compare Document Property Values .

Compare Document Property Values

Comparing property values allows you to easily see the differences between the property values of two similar documents. It also allows you to update the property values in custom property sets of one of the documents with the values of the other document. You cannot update internal property values.


Note:

To update property values requires the **Set Property Value** privilege.

Use these steps for [PowerUser](#) and [PowerWeb](#).

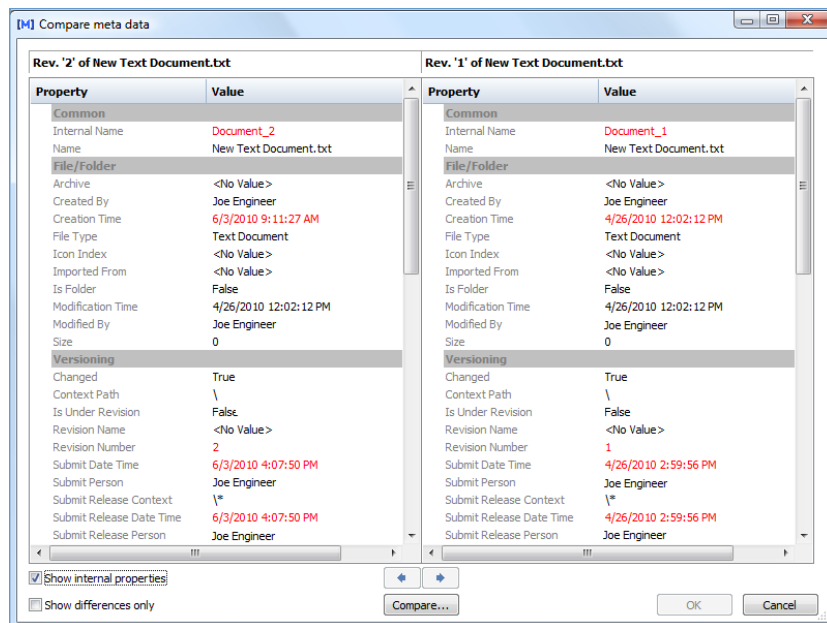
To compare document property values:

1. Select two documents and open the **Compare** dialog as described in [Compare Files](#).

You can open the **Compare Property Values** dialog immediately by pressing the **Ctrl** key while clicking the **Compare** button .

2. In the **Compare** dialog, click **Compare property values**.

The **Compare Property Values** dialog box appears similar to the following figure.



The names and revision numbers of the selected documents are shown at the top of the dialog box so that you can distinguish between the two documents. The names of each property used by the documents appear in the **Property** column below each document grouped by property sets, which appear as shaded rows.

Properties that have the same value for both documents appear in black text in the **Value** column. Property values that are different between the two documents appear in red text. Properties that are empty display **<No Value>**. By default, only the properties in the Custom property set are shown.

3. To show the properties contained in the internal property sets, select **Show internal properties**.
4. To show only the properties that are different between the two documents, select **Show differences only**.
5. To update the property of one document with the property value of the other document:
 - a. Select the check box next to the property value that you want to apply.
 - b. Click the arrow button that points to the document to which you want to apply the selected value.

The value is applied to the other document and the text color changes to black to indicate that the property values are identical.

The validation settings of custom properties are not evaluated when properties are updated this way.

6. Click **OK** to close the **Compare Property Values** dialog.

Print a Document

The Meridian document viewer allows you to print all or selected pages of a document to any Windows system printer.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Before printing a document, you can zoom to a particular part of the document and then you can use the **Print view** button on the **Print** dialog box to print that view.

Note:

When you print a document whose source is a PDF, and the PDF does not have a rendition, PowerWeb prints the source PDF instead of generating a rendition.

If the PDF has a rendition, PowerWeb will print the rendition.


To print a document:

1. Click the **Print** toolbar button.
The **Print** dialog box opens.
2. Select the print options you want:
 - **All** — All pages.
 - **Current** — Current page.
 - **Page numbers** — Enter specific page numbers to print separated by commas such as 1,2,5 or enter a range of pages for example 2-6. Total indicates the number of pages to be printed.
 - **Include Comments** — Include comments on the printout. This has no effect when printing a view.
 - **Include Annotations** — Include annotations on the printout. This has no effect when printing a view.
3. Choose between two options:
 - If you want to only print the current view, click **Print view**.
 - Otherwise, click **Print**.
The browser print dialog opens. If the document is configured to so, a watermark appears on the printed document.
4. Click **Print**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To print a document:

1. Click the **Print** button .
The **Pages** dialog box appears.
2. Select **All** to print the entire document or type page numbers separated by commas (**1,2,5**, for example) or type a page range (**1-5**, for example) in the text box.
Total updates to indicate the number of pages that will be printed.
3. Click **Print**.
A progress bar updates as the specified pages are prepared for printing and the Windows **Print** dialog box appears.
4. Select the printer where you want to send the pages, set other options as necessary, and click **Print**.
The specified pages are printed on the selected printer.
5. Repeat steps 2 to 4 if you want to print additional pages or click **Done** if you are finished printing.

Email Documents

You can send vault documents by email either as attachments to messages from the PowerUser or as shortcuts from PowerWeb.

Note:

The attachments or shortcuts that you send in email messages correspond to the latest released revision of the documents in the context from which they were added to the message.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To send document shortcuts from within PowerWeb:

1. In any Navigation view, click the document name hyperlink of the document that you want to send.
The document's property pages appear.
2. On the **Document** property page, select the URL that appears at the bottom of the page and copy it to the Windows Clipboard.
The URL can be useful for more than just email messages. The URL can be pasted into any application that supports hyperlinks.
3. In your email application, paste the URL as a link using the email application's normal command.
4. Select recipients, type a message subject, type additional text as desired, and send the message as you normally would.

PowerUser Procedures

Note:

The Messaging Application Programming Interface (MAPI) must be enabled on your PC for this command to be available.

To send documents from PowerUser:

1. In any Navigation view, select the documents that you want to send.
2. On the **Document** menu, select **Send to Email Recipient**.
The **Email Documents** dialog box appears.

3. Click options or type values using the descriptions in the following table.
4. Click **OK**.
A new email message is opened in your default email application with the document attachments or shortcuts that you selected added to the message.
5. Select recipients, type a message subject, type additional text as desired, and send the message as you normally would.

Email options

Option	Description
Attach document	<p>Attaches a copy of each selected document to the email message. No workflow is started for the document and the copy is not tracked by Meridian.</p> <p>You can also attach vault documents to an email message by dragging them from any Navigation view and dropping them onto an open message window just as you would from Windows Explorer.</p>
Add PowerUser Shortcut	<p>If Microsoft Outlook is installed on your PC, Meridian adds a shortcut to the body of the email message that the recipient can click to open the document in PowerUser.</p> <p>If Microsoft Outlook is not installed on your PC, Meridian adds a vault query for the document to the body of the email message. Recipients can copy and paste the query into Windows Explorer to open the Meridian vault in PowerUser with the document selected.</p>
Add PowerWeb URL	<p>Adds the URL of the document to the body of the email message. Recipients can copy and paste the URL into Internet Explorer to open the vault in PowerWeb with the document selected.</p>
Attach rendition	<p>Attaches a copy of the current rendition of the document to the email message.</p>

Subscribe To Changes

When you are responsible for important documents that could be changed by others, you might want to be notified when changes occur of which you are not aware. You can subscribe to those documents to receive email messages when events occur that you are interested in. You may also subscribe to receive reminders for specific documents for which a System Administrator has configured periodic reminders. If you have the **Allow Management of Subscriptions for others** privilege, you can add or remove subscriptions for other users.

Notes About Functionality

- You might also receive event notifications or reminders for documents to which you did not subscribe. These could be the result of automatic notifications configured by a System Administrator.
- For folder subscriptions you can subscribe to events that occur on documents contained in the folder at that moment. If a document is added to the folder later, you are not automatically subscribed to that document. For project subscriptions, you can subscribe to events that occur on the project, such as project workflow transitions.
- Subscriptions require some configuration by a System Administrator. Also, you must be a member of a group that has been granted the **Allow Subscriptions** or **Allow Management of Subscriptions for others** privileges in the folder containing the documents that you want to subscribe to. See the *Security Privilege Descriptions* section of the *Meridian Enterprise Configuration Guide* for more information.
- Notifications are only sent to your primary email address as set by a System Administrator and as described in the *Create and edit user accounts* article in the *Meridian Enterprise Administrator's Guide*.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Subscribe to Document or Folder

To subscribe to changes on a document or folder:

1. In any navigation view, select the documents or folders that you want to change subscriptions for.

2. Choose one of the following options:

- In the **Document** or **Folder** ribbon, in the **Action** group, click **Subscribe**.
- Right-click anywhere within your selection, point to **Document**, and then click **Subscribe** on the shortcut menu that appears.

The **Subscribe** dialog box appears and lists the available events and reminders that you can subscribe to. The events to which you have already subscribed are selected.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Choose between two options:
 - Select **Folder** > **Subscribe**.
 - Select **Document** > **Subscribe**.

3. Select events you want to subscribe to for the selected documents or folders.

4. Click **Next**.

The next page of the dialog box opens.

5. Choose between two options:

- If you have the **Allow Management of Subscriptions for others** privilege, select the users who should receive notifications about the selected documents.

You can only deselect yourself if at least one other user is selected.

- If you do not have the **Allow Management of Subscriptions for others** privilege, proceed to step 6.

6. Click **Next**.

The next page of the dialog box opens. This page lists the changes you have made and asks you to confirm them.

7. Click **OK**.

Unsubscribe from Document or Folder

To unsubscribe from changes on a document or folder:

1. In any navigation view, select the documents or folders that you want to change subscriptions for.

2. Choose one of the following options:

- In the **Document** or **Folder** ribbon, in the **Action** group, click **Unsubscribe**.
- Right-click anywhere within your selection, point to **Document**, and then click **Unsubscribe** on the shortcut menu that appears.

The **Unsubscribe** dialog box appears and lists the available events and reminders that you can unsubscribe from.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Choose between two options:
 - Select **Folder** > **Unsubscribe**.
 - Select **Document** > **Unsubscribe**.

3. Select events you want to unsubscribe from for the selected documents or folders.
4. Click **Next**.

The next page of the dialog box opens.

5. Choose between two options:
 - If you have the **Allow Management of Subscriptions for others** privilege, select the users who should no longer receive notifications about the selected documents.
You can only deselect yourself if at least one other user is selected.
 - If you do not have the **Allow Management of Subscriptions for others** privilege, proceed to step 6.

6. Click **Next**.

The next page of the dialog box opens. This page lists the changes you have made and asks you to confirm them.

7. Click **OK**.

Subscribe to Project

To subscribe to changes on a project:

1. In any navigation view, select the projects that you want to change subscriptions for.
2. Choose one of the following options:
 - To take action from the **Folder** ribbon:
 - a. In the **Folder** ribbon, in the **Action** group, click the down arrow next to **Subscribe**.
 - b. Select **Subscribe to Project** from the menu that appears.
 - Right-click anywhere within your selection, point to **Folder**, and then click **Subscribe to Project** on the shortcut menu that appears.

The **Subscribe** dialog box appears and lists the available events and reminders that you can subscribe to. The events to which you have already subscribed are selected.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder.
 - b. Select **Folder** > **Subscribe to Project**.
- 3. Select events you want to subscribe to for the selected projects.
- 4. Click **Next**.

The next page of the dialog box opens.
- 5. Choose between two options:
 - If you have the **Allow Management of Subscriptions for others** privilege, select the users who should receive notifications about the selected documents.

You can only deselect yourself if at least one other user is selected.
 - If you do not have the **Allow Management of Subscriptions for others** privilege, proceed to step 6.
- 6. Click **Next**.

The next page of the dialog box opens. This page lists the changes you have made and asks you to confirm them.
- 7. Click **OK**.

Unsubscribe from Project

To unsubscribe from changes on project:

1. In any navigation view, select the project that you want to change subscriptions for.
2. Choose one of the following options:
 - To take action from the **Folder** ribbon:
 - a. In the **Folder** ribbon, in the **Action** group, click the down arrow next to **Unsubscribe**.
 - b. Select **Unsubscribe from Project** from the menu that appears.
 - Right-click anywhere within your selection, point to **Folder**, and then click **Unsubscribe from Project** on the shortcut menu that appears.

The **Unsubscribe** dialog box appears and lists the available events and reminders that you can unsubscribe from.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder.
 - b. Select **Folder** > **Unsubscribe from Project**.
3. Select events you want to unsubscribe from for the selected documents.

4. Click **Next**.

The next page of the dialog box opens.

5. Choose between two options:

- If you have the **Allow Management of Subscriptions for others** privilege, select the users who should no longer receive notifications about the selected documents.
You can only deselect yourself if at least one other user is selected.
- If you do not have the **Allow Management of Subscriptions for others** privilege, proceed to step 6.

6. Click **Next**.

The next page of the dialog box opens. This page lists the changes you have made and asks you to confirm them.

7. Click **OK**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To subscribe to or unsubscribe from changes:

1. In any navigation view, select the documents that you want to change subscriptions for.
2. On the **Document** or **Folder** menu, select **Change Subscription**.

The **Change Subscription** dialog box appears and lists the available events and reminders that you can subscribe to. The events to which you have already subscribed are selected.

Changes to the selected events in this list are not saved if you click the **Subscribers** button and will be reset when that dialog is closed. If you want to change the subscriptions of other users, select the subscribers in the next step first and then change the events to which they are subscribed.

3. To change the subscriptions of other users:

- a. Click **Subscribers**.

The **Subscribers** dialog box appears and lists all system users. By default, your name is selected to change only your subscription options.

- b. Select or clear user names to change their subscriptions to the selected items.
- c. Click **OK**.

4. Select or clear events and reminders to change the subscriptions to the selected items for the users that you selected.

The check boxes shown by this dialog box can represent three states that indicate how many of the selected subscribers are subscribed to the corresponding event.

5. To view the names of the subscribers for a specific event, select the event and click **Subscribers**.

The **Subscribers** dialog box appears and lists the users that are subscribed to the selected event.

6. Click **OK**.

View And Remove Subscriptions

You can view all of your subscriptions at once with the subscriptions viewer in a web browser. There you can filter and sort subscriptions to meet your needs and remove unwanted subscriptions.

Note:

A System Administrator must install and configure subscriptions to use this command.


PowerWeb Procedures


Use these steps for [PowerWeb](#).

To open the subscriptions viewer:

1. In any navigation view, select the documents or project folders that you want to change subscriptions for.
2. In the **Document** or **Folder** ribbon, in the **Actions** group, click **Change Subscription**.

A page titled **Meridian: Subscriptions viewer** opens in a new tab. The subscriptions are sorted on the column indicated by the arrow icon ↓ in the column heading. Your privileges to manage the subscriptions are shown at the bottom of the page.

3. To change the sort order or select a filter:
 - a. Point to a column heading.
 - b. Click the arrow button  that appears.
 - c. Click the sort option or filter that you want on the shortcut menu that appears.

If you selected a sort option, the arrow icon ↓ appears in that column heading. If you selected a filter, the filter icon  appears in that column heading.

PowerUser Procedures

Use these steps for [PowerUser](#).

Open Subscriptions Viewer

To open the subscriptions viewer:

1. In the **Tools** menu, click **View Subscriptions**.

A page titled **Meridian Enterprise 2022: Subscriptions viewer** opens in a browser window. The subscriptions are sorted on the column indicated by the arrow icon ↓ in the column heading. Your privileges to manage the subscriptions are shown at the bottom of the page.

2. Continue as described in step 2 above.

Remove Subscriptions

To remove subscriptions:

- Select the subscriptions that you want to remove, select **Unsubscribe** in the command list, and click **Execute**.

The view refreshes to show the subscriptions removed.

Change a Document's Revision Number

Under most circumstances, the revision number of an existing document will not need to be changed. That is, if the document is created new within the vault, Meridian Enterprise will assign the correct revision number. When the document is revised in a workflow, its revision number is updated accordingly. Even if existing documents are imported into the vault, as long as accurate metadata is imported or application link data exchange is configured, the revision numbers of documents should be correct. But occasionally there are circumstances when the revision number of a document must be changed manually.

Regardless of the current value of the **Revision** property, revisions of the document will display in chronological order in the **Revisions** dialog displayed by invoking the **Show Revisions** command.

You must be granted the **Change Revision Number Manually** privilege to perform this action, as described in the *Security Privilege Descriptions* article in the *Meridian Enterprise Configuration Guide*.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To change the revision number of an existing document:

1. Select the document that you want to change.
2. Choose one of the following options:
 - In the **Edit** ribbon, in the **Organize** group, click **Modify Revision Number**.
The **Confirm Revision Number Change** dialog box appears.
 - Right-click the document, then select **Edit > Organize > Modify Revision Number**.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Edit > Organize > Modify Revision Number**.
3. Type a new revision number in **New revision number**.
4. Click **Yes**.

The revision number is changed.

PowerUser Procedures

Use these steps for [PowerUser](#).

To change the revision number of an existing document:

1. Select the document that you want to change.
2. Click the **Document** tab to display the **Revision** property.
3. Click **Edit**.
The **Revision** property becomes editable.
4. Change the value of **Revision** and click **OK**.
The revision number is changed.

Issue a New File Name

Under most circumstances, the file name of an existing document will not need to be changed. That is, if the document is created new within the vault, Meridian will assign the correct file name if the document is assigned a document type that is configured to calculate file names. But occasionally there are circumstances when the file name of a document must be reissued, such as after importing documents with file names that do not conform to the document type standard.

The **Issue New File Name** command executes the same process as that which occurs when a new document is created. If the document type is configured to calculate file names with a sequence number, the next available sequence number is used.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To issue a new file name for a document:

1. Select the document for which you want to issue a new file name.
2. Choose one of the following options:
 - In the **Edit** ribbon, in the **Organize** group, click **Issue New File Name**.
The file is renamed.
 - Right-click the document, then select **Edit > Organize > Issue New File Name**.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Edit > Organize > Issue New File Name**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To issue a new file name for a document:

1. Select the document for which you want to issue a new file name.
2. On the **Document** menu, select **Issue New File Name**.
The file is renamed.

Rename Document

This article describes how to rename a document. You cannot rename a document if it is under change or locked.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To rename a document:

1. Select the document that you want to rename.
2. Choose one of the following options:
 - In the **Edit** ribbon, in the **Organize** group, click **Rename**.
The **Confirm Document Rename** dialog box appears.
 - Right-click the document, then select **Edit > Organize > Rename**.
The **Confirm Document Rename** dialog box appears.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Edit > Organize > Rename**.
The **Confirm Document Rename** dialog box appears.
3. Type a new name in **New name of the document**.
4. Click **Yes**.
The name is changed.

PowerUser Procedures

Use these steps for [PowerUser](#).

To rename a document:

1. Select the document that you want to change.
The document must be available for changes before you can rename it.
2. Click the **Edit** menu in the toolbar and select **Rename**.
Alternatively, you can press **F2** on your keyboard.
The document name becomes editable.
3. Rename the document.

You cannot change the file extension for the document using the **Rename** action.

4. Click off the document or press **Enter** on your keyboard.

The document is renamed.

References

If a vault only uses reference types that are managed automatically by Meridian, then your responsibility in managing references is minimized to simply viewing and verifying references. But if a vault also uses reference types that are created manually, then reference management can also include creating and deleting references.

View References

Meridian makes it easy to view and understand the references between documents.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To view the references of the selected document:


1. Choose between two options:

- In the view bar, click the **References** icon .
- On the **Document** ribbon, in the **Information** group, select **Show References**.

The **References** page of the document appears in the document pane. It shows manually created references plus any CAD external references. Information about the selected document is shown at the top of the page.

References *to* the selected document are listed in the **Incoming references** panel. References *from* the selected document to other documents are listed in the **Outgoing references** panel. To the right of each document name is an icon that shows the document's status and the revision number of the document.

2. From this page, you can view more or fewer documents:


- To view only the references of a particular reference type, click **Select** and then select the reference types that you want to see from the **Select reference types** list.
By default, all reference types are shown.
- To make one of the referenced documents the selected document and display its property pages, click its name.
- To view a referenced document in a viewer window, click its document icon.
- To select a referenced document and view its respective references, click the **Change to this document** icon .

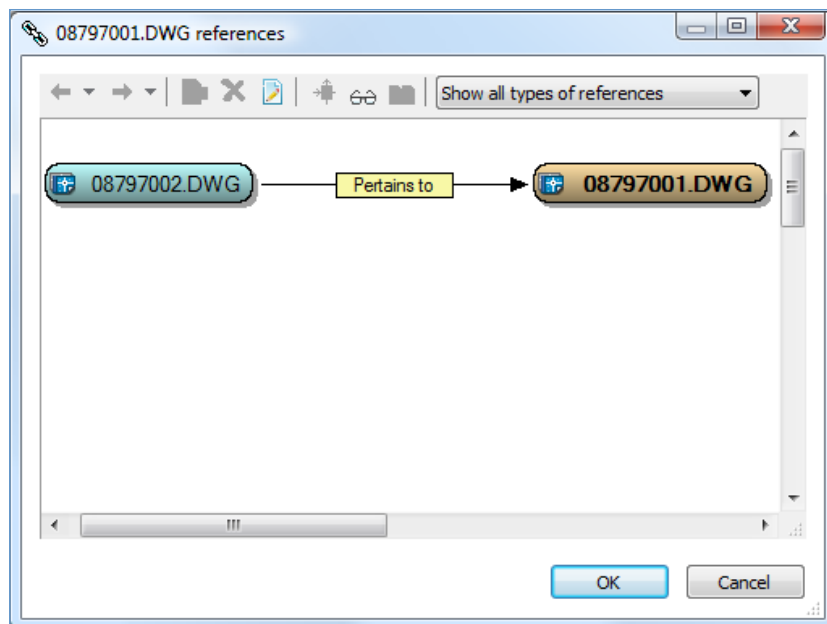
PowerUser Procedures

Use these steps for [PowerUser](#).

View all References for a Document

To view all references of the selected document:

- Click the **Show Referenced Documents** button  on the **Document** property page.
A dialog box appears, similar to the following figure. The file name of the selected document appears in bold. References to and from other documents appear as arrows; the arrowhead indicates the direction of the reference, either incoming or outgoing. The type of the reference appears as a yellow label in the middle of the arrow.



Note:

Project copies that have already been released as new revisions of the master documents appear crosshatched if the **Display inactive project copies** option is enabled as described in [Show Master And Project Copies](#).

View Only Certain Types of References






This command is ideal for viewing references without regard to the location of the referenced documents in the vault. An alternative method of viewing references is with the Reference Explorer. It displays the same referenced documents, but it also displays each document's location in the vault. It also provides tools for previewing, comparing, and viewing revisions. For

more information, see [Reference Explorer](#).

To view only references of a certain type:

- Select the reference type from the list in the toolbar.
The toolbar buttons are described in the following table.

Reference browser toolbar buttons

Button	Description
	Show the property pages of the selected document.
	Deletes the selected reference.
	Opens the selected document in its native application. Also available on the context menu that is shown by right-clicking a document.
	Makes a referenced document the selected document. Also available on the context menu that is shown by right-clicking a document.
	Opens the selected document in a new viewer window.

Create References

Creating a reference establishes a link between two documents so that they can be found together, the effect of a revision can be traced, and the origins of derivative or replacement documents can be traced.

Note:

Meridian does not support circular references. That is, any combination of documents that, when referenced to one another, create a circular path.

PowerWeb Procedures

Use these steps for [PowerWeb](#).


Create References by Selecting Documents

Note:

The reference source document and destination documents must be visible in the same view to create references.

To create references by selecting documents:


1. Select the documents that you want to link.
2. Right-click the document that you want to be the destination of the links.
3. Point to **Document** and then click **Create References**.
The **Create References** dialog box appears.
4. To reverse the direction of the references, click **Reverse**.
5. Select a reference type from **Reference Type** and then click **OK**.

The references are created as indicated by the **Show Referenced Documents** icon  on the **Document** property pages of the linked documents.

Create References by Searching for Documents

To create references by searching for documents:

1. Choose one of the following options:
 - From the context menu:
 - a. Right-click one of the documents that you want to link.
 - b. Point to **Document** and then click **Create References**.
The **Find destination documents for reference** dialog box appears.
 - In the **Document** ribbon, in the **Action** group, click **Create References**.
This option is not available if multiple documents are selected.
The **Find destination documents for reference** dialog box appears.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Document > Create References**.
The **Find destination documents for reference** dialog box appears.
2. Select a reference type from **Reference Type**.
3. Type the beginning or all of the name of the documents that you want to link to in **Name** or type keywords for other properties in **Quick Search** and press **Enter**.
The matching document names appear in the list.
4. Select the documents that you want to link to the source document and then click **Create References**.

The references are created as indicated by the **Show Referenced Documents** icon  on the **Document** property pages of the linked documents.

PowerUser Procedures


Use these steps for [PowerUser](#).

To create a reference:

1. Select one of the documents to be linked.
If the other document to be linked is also visible, select it also.
2. On the **Document** menu, select **Create Reference**.
If you only selected one document, the **Select Documents** dialog box appears.
3. Select the other document to be linked and click **OK**.

The **Create Reference** dialog box appears listing the documents to be linked.

4. To reverse the direction of the reference, click **Reverse**.
5. Select a reference type from **Reference Type** and then click **OK**.

The reference is created as indicated by the **Show Referenced Documents** icon  on the **Document** property pages of both documents.

Synchronize References

Note:

This topic refers to all of the application links described in this chapter except the Lotus Notes link.

The references that are created by Meridian to manage the external references of a document can be synchronized from the document. This helps keep the Meridian references synchronized when external references are added or deleted in the document's native application. It is also necessary when external references are added to the vault by methods that bypass the native application.

Reference detection and management is primarily performed by the Meridian application link from within the native application. It is also performed by the Meridian import tools. But if the link is not loaded in the native application or documents with references are imported to the vault without using the Meridian import tools, the external references are not detected and Meridian references are not automatically created. In that case, synchronization must be performed manually.

Meridian references are created and synchronized in the following ways:

- Importing new documents with the **Document Import Tool** and the **Resolve references** option enabled as described in [Document Import Tool](#).
- Importing new documents with **Assembly Import tool** described in [Import Assemblies](#).
- Opening or saving documents in the vault from within an application that has a Meridian application link loaded. This is also supported by Remote mode as described in [Offline Mode And Remote Mode](#) and in [Application Links In Remote Mode](#).
- By the **References from File** or **Synchronize References** command as described in the following procedures.

Note:

We recommend you close files in AutoCAD or synchronize files from within AutoCAD. This is because with some versions of AutoCAD, synchronizing references with some AutoCAD files—such as sheet set files—from within PowerUser while the file is open in AutoCAD can produce an error.

PowerWeb Procedures

Use these steps for [PowerWeb](#). Synchronization can be applied to AutoCAD, MicroStation, and Microsoft Office files only. References can be synchronized from different file types.

The **References from File** action triggers the publishing job configured for the **Synchronize References** setting in your vault settings. This setting is described in *Configure a Vault For Publisher* in the *Meridian Enterprise Configuration Guide*.

To manually synchronize Meridian references of a document:

- In the **Document** ribbon, in the **Title Block** group, click **References from File**.
- To synchronize from the **Navigation** pane:
 1. Right-click your selection.
 2. Point to **Document**.
 3. Select **Synchronize References from Files**.

PowerUser Procedures

The **References from File** action triggers the publishing job configured for the **Synchronize References** setting in your vault settings. This setting is described in *Configure a Vault For Publisher* in the *Meridian Enterprise Configuration Guide*.

To manually synchronize Meridian references of a document:

- In the **Document** menu, point to **Synchronize**, and then click **References from File**.

Other Applications

The **Synchronize References** action triggers the publishing job configured for the **Synchronize References** setting in your vault settings. This setting is described in *Configure a Vault For Publisher* in the *Meridian Enterprise Configuration Guide*.

To manually synchronize Meridian references of a document:

- In the **Meridian** menu, in the **Meridian** page of the ribbon, or in the **Accruent** toolbar in the native application, click **Synchronize References**.

Reference Explorer

The Reference Explorer is an advanced tool for viewing references between documents. It is used by several Meridian commands to display different reference types:

- **Show Assembly Structure** — Shows only outgoing CAD external reference types
- **Show Where Used** — Shows only incoming CAD external reference types and custom reference types
- **Show Derivatives** — Shows **Derived From** and **Derived To** reference types
- **Show Project Copies** — Shows the copies made in folders of a master document with Advanced Project Workflow Module.
- **Copy with References** — Copies a document and its references to a new document
- **Derive with References** — Derives a document and references from a source document
- **Create Project Copy** — Copies a master document to a folder as a project copy

The Reference Explorer is built into the **Copy with References** and **Derive with References** commands, so the Reference Explorer appears automatically when creating references. The other commands display the Reference Explorer only to show different reference types.

Note:

If a part is used in more than one sub-assembly, each occurrence of the part in the Reference Explorer tree is considered as a separate document for the purpose of selection. However, that does not affect the resulting copy operation.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To open a document in the Reference Explorer and view its references:

1. Select the document for which you want to view its references.
2. Choose one of the following options:
 - In the **Document** ribbon, in the **Information** group, select one of the first three commands listed above, depending on the reference type that you want to view.

The Reference Explorer opens and shows documents that are linked to the selected document by the applicable reference type.


- From the context menu:
 - a. Right-click the document, and point to **Document > Information**.
 - b. Select one of the first three commands listed above, depending on the reference type that you want to view.

The Reference Explorer opens and shows documents that are linked to the selected document by the applicable reference type.
- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Point to **Document > Information**.
 - c. Select one of the first three commands listed above, depending on the reference type that you want to view.

The Reference Explorer opens and shows documents that are linked to the selected document by the applicable reference type.

3. Choose one or more of the following options:

- To show a different reference type, click **Assembly Structure, Where Used, or Derivatives**.
- To show references that were created manually, in the **Assembly** ribbon, in the **Options** group, enable **Display Manual References**.
- To show project copies that have already been released, superseded, or merged with the master document, in the **Assembly** ribbon, in the **Options** group, enable **Display Inactive Project Copies**.
- To display a sub-set of a document's properties in the right pane, select a document in the left pane.

These properties are configurable by a System Administrator as described in *Configure Reference Browser Properties* in the *Meridian Enterprise Configuration Guide* .
- To make one of the reference documents the selected document, select the document in the left pane and click the **Document** icon  in the view bar.
- To download the document and open it in its registered application, in the **Assembly** ribbon menu, click **Open Document**.
- To show a shortcut menu of all commands that are applicable to the selected document, right-click a document.
- To close the Reference Explorer, click **Exit**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To open a document in the Reference Explorer and view its references:










1. Select the document for which you want to view its references.
2. On the **Document** menu, select one of the first four commands listed above depending on the reference type that you want to view.


The Reference Explorer opens and shows documents that are linked to the selected document by the applicable reference type.

3. Select a document in the left pane to display its location in the **Folders** view of the vault in the right pane.
4. Select options from the toolbar using the descriptions in the following table or right-click a document to show a shortcut menu of commands that are applicable to the selected document.

To select or deselect an entire assembly with all parts and subassemblies related to it, hold down the Shift key while clicking either **Select for copy** or **Use original**.

Reference Explorer toolbar buttons

Option	Description
	Opens the selected document in a new viewer window.
	Compares two selected documents.
	Shows the revisions of the selected document.
	Show the property pages of the selected document.
	Refreshes the Reference Explorer to display the most recent changes.
	Shows outgoing CAD external reference types.
	Shows incoming CAD external reference types and custom reference types.
	Shows Derived From and Derived To reference types.
	Shows project copies and their master documents. Requires the Advanced Project Workflow Module.

Option	Description
	<p>When creating copies, shows the assembly copy options. When viewing references, shows visibility options for manual references and inactive project copies:</p> <ul style="list-style-type: none">• Display manual references — Show only references that can be created manually and are not created automatically by application links. Enabled by default.• Display inactive project copies — Along with active project copies, also shows project copies that have been released as new master revisions, have been superseded by the master document, or have been merged with the master document. Enabled by default.

5. To make one of the reference documents the selected document, select the document in the left pane and click **Go to**.

Hybrid Documents

Meridian hybrid documents are multiple files that are treated as one document by Meridian commands. To edit any one part of a hybrid document, the main part must be placed in a workflow. Only then can a part be edited.

Hybrid document types are often used to manage hybrid drawings, but they can also be used for other documents that should be treated as one document but stored as separate files. Hybrid document types are not enabled by default. Consult a System Administrator for the names, associated file types, and purposes of hybrid document types in your vaults.

Note:

Microstation does not support Hybrid documents.

View Hybrid Parts

You can view the parts that comprise a hybrid document like any other document in the vault.

No custom property pages appear for hybrid parts. Hybrid parts adopt the property values of the main document to which they are attached.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To view the parts of a hybrid document:

1. Display the property pages for the hybrid document for which you want to view its parts.
2. Click the **Hybrid Parts** tab in the upper-right corner of the page.

The **Hybrid Parts** page appears, listing the names of the hybrid parts attached to the selected document.

3. Select the hybrid part that you want to view.

The **Document** property page for the selected part appears.

4. Click the **Viewer** tab to show the hybrid part in a viewer window.

PowerUser Procedures

Use these steps for [PowerUser](#).

To view the parts of a hybrid document:

1. In any navigation view, click the plus icon to the left of the document icon.

If the document is a hybrid document, the parts appear indented below the main document.

2. Click one of the part names to show its **Document** property page and to show the part in the viewer.

Import Hybrid Documents

Importing hybrid documents is almost as easy as importing non-hybrid documents. The configuration of a hybrid document type does most of the work. That is, determining which document should be the main hybrid part and which documents should be subordinate parts.

Consult a System Administrator for the names, associated file types, and purposes of hybrid document types defined in your vaults. You will need to know which document type to assign to the imported documents depending on the file types of the documents.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To import a hybrid document:

1. Upload the main document as described in [Upload Documents](#).
The document appears in the current view.
2. Attach each hybrid part to the main document as described in .
3. Upload a file for each hybrid part as described in [Upload Hybrid Part Content](#).

PowerUser Procedures

Use these steps for [PowerUser](#).

To import a hybrid document:

1. Drag and drop all of the files that you want to join as a hybrid document from Windows Explorer into the folder in the **Folders** view where you want the hybrid document to reside.
If only one document type is configured for the file types that you are importing, that document type is assigned to the main part of the hybrid document. If more than one document type is configured for the file types that you are importing, a dialog box appears in which you can select from among the document types. The dialog box may reappear for each file you are importing. If you do not select the same document type for all of the files you are importing, the files will not be joined into a single hybrid document.
2. Select the appropriate document types for the documents.
If the document type that you are assigning to the files is configured to display property pages during import, they will appear next.

3. Complete the property pages the same as if you were creating a new non-hybrid document.

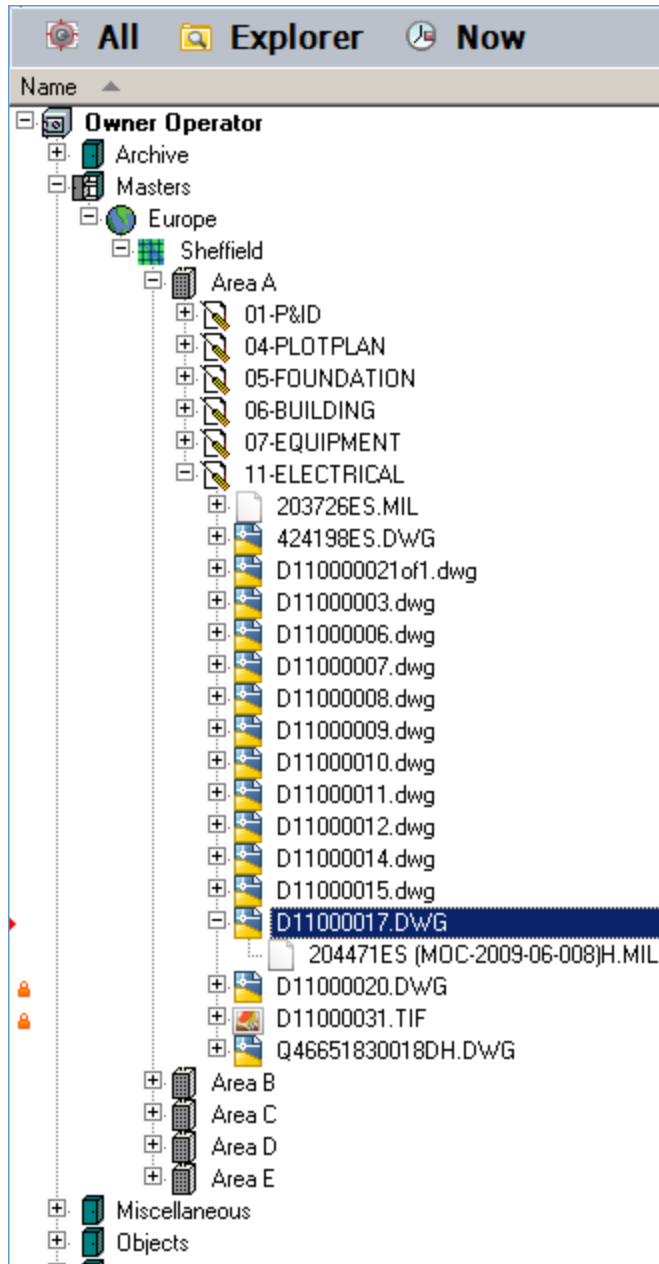
If the files that you are importing share the same file name but have different file extensions, for example, 12345678.dwg and 12345678.cal, the files are automatically joined as a single hybrid document. The file type defined in the document type as the main part of a hybrid document will determine which file becomes the main part of the hybrid document and which files become subordinate parts.

If the files you are importing do not share the same file name, the files import as separate documents assigned the document types that you selected in step 2.

4. Select the document that you want to become a subordinate part of the hybrid document and drag and drop it onto the file that you want to become the main part of the hybrid document.
5. Select **Attach as Hybrid Part** from the shortcut menu that appears.

The main part of the hybrid document must be in a workflow for the **Attach as Hybrid Part** command to be enabled. Depending on the configuration of the vault, newly imported documents may not be in a Quick Change (default) workflow. Start a workflow, if necessary, before joining the documents.

The complete hybrid document should now appear similar to the following figure, with the subordinate part documents attached to the main part of the hybrid document.



All properties of the main part of the hybrid document apply to the subordinate part documents as well. All commands executed on the main part of the hybrid document will also be applied to the subordinate part documents.

Download Hybrid Parts

Downloading a hybrid part creates a copy of the file on your computer.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To download a hybrid part:

1. Display the property pages for the hybrid document for which you want to download a part.
2. Click **Hybrid Parts** in the upper-right corner of the page.
The **Hybrid Parts** page appears, listing the names of the hybrid parts attached to the selected document.
3. Select the hybrid part that you want to download.
The **Document** property page for the selected part appears.
4. On the **Document** menu, select **Download Document**.
The document is downloaded.

PowerUser Procedures

Use these steps for [PowerUser](#).

To download a hybrid part:

1. In any navigation view, click the plus icon to the left of the document icon.
If the document is a hybrid document, the parts appear indented below the main document.
2. Drag and drop the document onto your desktop or the Windows Explorer location where you want to work with it.

Attach Parts To a Hybrid Document

Attaching parts to a hybrid document joins multiple documents together as a single hybrid document that share the same properties and workflow.

Notes About Functionality

- Consult a System Administrator for the names, associated file types, and purposes of hybrid document types defined in your vaults. You will need to know which document types are designated as hybrid document types and which file types are associated with each.
- The main document must be under change by you in a workflow before you can attach parts to it. For information about using workflows, see [Route a Document In a Workflow](#).
- An alternative method is possible for creating a hybrid drawing if all hybrid parts reside in the same vault and have the same hybrid document type applied. Simply open the main part of the hybrid drawing in the CAD application, attach the subordinate parts using the application's command, and save the drawing. The application link will detect that the parts should be joined as a hybrid document and prompt you to confirm that you would like it to do so. The appropriate Meridian Enterprise application link must be installed.
- Creating hybrid documents with application links is not possible in Offline Mode if one of the documents exists only in the local workspace and does not yet exist in the vault. Such documents must be synchronized with the vault first so that they are assigned document types that define the hybrid part relationships.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To attach parts to a hybrid document:

1. Select the main document to which you want to attach part documents.
The property pages of the selected document appear.
2. On the **Edit** menu, select **Create New Part**.
The **Create New Hybrid Part** dialog box appears with the name of the main document as the default name for the new hybrid part.
3. Verify the name of the hybrid part and click **OK**.
The new part appears in the **Available hybrid parts** list on the **Hybrid Parts** page. To upload a file as content for the new part, see [Upload Hybrid Part Content](#).

PowerUser Procedures

Use these steps for [PowerUser](#).

To attach parts to a hybrid document:

1. Arrange the **Folders** view so that all of the parts of the hybrid document are visible, if possible.
2. Select the documents that you want to become subordinate parts of the hybrid document and drag and drop them onto the file that you want to become the main part of the hybrid document.
3. Select **Attach as Hybrid Part** from the shortcut menu that appears.

Upload Hybrid Part Content

Uploading hybrid part content attaches a new file to the current hybrid part document.

The main document must be under change by you in a workflow before you can upload hybrid part content to it. For information about using workflows, see [Route a Document In a Workflow](#). The **ActiveX compatibility mode** option must be disabled as described in [Personal Preferences](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To upload hybrid part content:

1. Select the name of an existing hybrid part as described in [View Hybrid Parts](#) or create a new hybrid part.

The **Document** property page of the hybrid part appears.

2. On the **Edit** menu, select **Upload Document**.

The **Upload Document** dialog box appears.

3. Click **Browse**.

4. Select the file that you want to upload as content for the current hybrid part.

5. Click **Open**.

The filename appears in the **Upload Document** dialog box.

6. Click **Yes**.

The selected file is uploaded as the hybrid part content and the **Upload Document** dialog box disappears.

PowerUser Procedures

Use these steps for [PowerUser](#).

To upload hybrid part content:

1. Navigate to the main document to which you want to upload a new hybrid part.
2. In Windows Explorer or on your desktop, select the file that you want to upload.
3. Drag and drop it onto the main hybrid document.

A shortcut menu appears.

4. Select **As Hybrid Part**.

The uploaded file is attached as a new part to the main hybrid document.

Remove Hybrid Parts

Detaching a part of a hybrid document separates the part and makes it an independent document.

Note:

- You can only remove a part from a hybrid document that is in the **Released** state.
- In Meridian 2021 PowerWeb, you can delete hybrid parts from locked documents if [Site Cache Mode](#) or no mode is selected. Deleting hybrid parts from locked documents does not work if [ActiveX Compatibility Mode](#) is selected.

PowerWeb Procedures

Use these steps for [PowerWeb](#). In the 2022 release, we made it easier to remove hybrid parts.

To remove a part from a hybrid document:

1. Display the property pages for the hybrid document for which you want to detach parts.
2. Click **Hybrid Parts** in the upper-right corner of the page.
The **Hybrid Parts** page appears, listing the names of the hybrid parts attached to the selected document.
3. Right-click the hybrid part you want to remove.
The context menu opens.
4. Select **Edit > Delete**.
A dialog box opens, asking you to confirm your choice.
5. Click **OK**.
The hybrid part is removed.

PowerUser Procedures

Use these steps for [PowerUser](#).

To remove a part of a hybrid document:

1. Right-click the part document that you want to detach.
2. Select **Detach Part** from the shortcut menu that appears.
If only one document type is configured for the file type that you are detaching, that document type is assigned to the detached document. If more than one document type is configured, a dialog box appears in which you can select from among the document types.

Rename Hybrid Parts

The main hybrid document must be under change by you in a workflow before you can rename it. For information about using workflows, see [Route a Document In a Workflow](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To rename a hybrid part:

1. Display the property pages for the hybrid document for which you want to rename a part.
2. Click **Hybrid Parts** in the upper-right corner of the page.

The **Hybrid Parts** page appears, listing the names of the hybrid parts attached to the selected document.

3. Select the hybrid part that you want to rename.

The **Document** property page for the selected part appears.

4. On the **Edit** menu, select **Rename**.

The **Confirm Document Rename** dialog box appears.

5. Edit the current name or type a new name.

6. Click **Yes**.

The new name appears on the **General** property page of the hybrid part.

PowerUser Procedures

Use these steps for [PowerUser](#).

To rename a hybrid part:

- Edit the name property as described in [View And Edit Properties](#).

Convert Normal Documents Into Hybrid Documents

A common type of hybrid document is a hybrid drawing. The drawing's vector file contains references to one or more separate raster images. The images are shown in the drawing but do not reside in the drawing. Together, the files comprise one drawing.

A hybrid drawing often begins as an image file and then later is inserted as a reference into a new vector file with an application like AutoCAD. If the image file resides in Meridian and the new vector file is created in Meridian, the files will remain separate by default. They will not be managed as a single hybrid document. Each document will have its own properties, revision history, and so on.

In order to create a proper Meridian hybrid document, the following steps should occur:

- The vector document created as the main part of a hybrid document type
- The properties of the raster document transferred to the hybrid document (to maintain the revision history, and so on)
- The raster document made a part of the main hybrid document
- The raster document inserted as a reference in the main part

You can perform all these steps manually, but Meridian Enterprise provides a command that does all but the last step for you. The command can be run on individual documents or on a selection of multiple documents.

Requirements

The following are prerequisites for conversion to succeed:

- The starting document must be under change by you.
- The starting document must be of a hybrid document type
- The hybrid document type must have at least one template configured
- The starting document file extension must be listed as a hybrid part (not the main part) in the import settings of the document type
- You must have the **Convert to Hybrid** privilege

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To convert a normal document into a hybrid document:

1. Select the starting documents.
2. On the **Document** ribbon, in the **Hybrid** group, click **Convert to Hybrid**.

The **Convert to Hybrid** dialog box lists the available templates.

3. Select the template from which you want the new main file of the hybrid document to be made.
4. Click **OK**.

The view refreshes to show the new main hybrid file with the starting document attached as a part. The properties of the starting document (including its name) are transferred to the main file and apply to the parts as well. Text specified in the document type is added to the end of the starting document names to make them unique.

PowerUser Procedures

Use these steps for [PowerUser](#).

To convert a normal document into a hybrid document:

1. Select the starting documents.
2. On the **Document** menu, click **Convert to Hybrid**.

If more than one template is assigned to the document type, the **Select Document Template** dialog box lists the available templates.

3. Select the template from which you want the new main file of the hybrid document to be made.
4. Click **OK**.

The view refreshes to show the new main hybrid file with the starting document attached as a part. The properties of the starting document (including its name) are transferred to the main file and apply to the parts as well. Text specified in the document type is added to the end of the starting document names to make them unique.

You may now open the main file and insert the part files as references and save the document.

Renditions

A rendition is a copy of a document in a format other than the original. Typically, the rendition is in a non-editable format and is distributed only for reference or hard copy printing while the original, editable source document is not distributed outside of the organization. Examples of rendition formats are Portable Document Format (PDF) and Autodesk Drawing Web Format (DWF). See the *Rendering Modules* article in the *Meridian Enterprise Server Administrator's Guide* to learn more about the rendering modules Meridian Enterprise supports. Renditions can often be created by the same application that is used to edit the original document or they can be created by a different application. In some cases, the renditions are stored in a separate vault or document management system than the source documents.

To learn how to configure renditions, see

Meridian Enterprise supports renditions in numerous ways:

- Import of renditions with the **Document Import Tool** as described in [Document Import Tool](#).
- Rendition viewing as described in [View Renditions](#).
- Rendition viewing options as described in [Appearance Options](#) and [Personal Preferences](#).
- Viewing of rendition properties as described in [View And Edit Properties](#).
- Printing renditions as described in [Print Renditions](#).
- Automatic updating of renditions upon running a workflow transition.
- Updating of renditions on demand as described in [Update Renditions](#).
- Attaching renditions to a document as described in [Attach Renditions](#).
- Attaching renditions to email messages sent from PowerUser as described [Email Documents](#).
- Automatic inclusion of renditions with source documents in packages.
- Specific rendition security privileges.
- Redlining renditions.

Meridian integrates with Meridian Enterprise Server to render and publish renditions.

A document has a rendition associated with it if it shows one of the rendition icons on its **Document** property page described in [Property Pages](#).

Working with renditions is described in the following topics.

View Renditions

When you view documents as described in [View Documents](#), you see either the source document or a read-only rendition of the document. By default, when you view a document in the PowerUser viewer, you see the source document even if a rendition is present in the vault. The default view in PowerWeb is configured by a System Administrator but is typically of the rendition, not the source document.

Notes About Functionality

- You may only view documents that reside in folders for which you have been granted the **View Content** privilege.
- To view documents with PowerWeb, you must also have the **Copy Outside Vault** privilege to download the document a read-only to your local workspace.
- Renditions are shown in the viewer that is assigned to the **Acrobat file** type as described in [Change Viewers](#) unless a System Administrator has configured the system to use only a specific viewer.
- To open properly in its default (Windows registered) application, the **BCRenditionPropertySet.Format** property of the rendition must be set to the file extension of the rendition. Meridian will attempt to open the file in Adobe Reader if the property is empty.
- 3D PDFs are not supported. Renditions with PRC support ON are not shown in PowerWeb.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

View the rendition

To show the rendition in PowerWeb:

- In the **Document** ribbon **Rendition** group, click **Show**.
- Right-click over your selection, point to **Edit**, and then click **Open Rendition**.
- From [the Thumbnails view](#):
 1. Right-click a thumbnail of a document.
 2. Point to **Edit** and then select **Open Rendition**.

View the Rendition Using the Forge Rendering Module

To perform these procedures, you must have [Forge configured as a rendering application](#) and started rendering a document sent to Forge. Learn more about [configuring an application for rendering and viewing renditions in Meridian PowerWeb](#).

To view a document's advanced information and hidden properties:

1. On the **Document** property page of the document, click the document icon in the upper-left corner of the page.

The **Advanced** and **Stored Properties** tabs appear.

2. Click the **Stored Properties** tab.

In the **Stored Properties** tab, expand **Document**.

The URL of the result appears in **Forge ID part 1(2)**.

The document icon shows that the rendition is up to date.

3. Click the **Advanced** tab.

In the **Streams** group, the **Rendition** field appears empty.

After a successful rendering, the Publisher log shows data about the rendition job, similar to the following:

```
1[RENDERING] INVOKE RENDERING MODULE "FORGE SERVICE"  
2[FORGE SERVICE] UPLOAD FILE TO BLOB. FILEPATH: C:\<PATH>\RP_FRGE_100.DWG, FILEID: E716BE7B-DAC3-424B-B204-1F656FCE7D38  
3[FORGE SERVICE] SEND CONTENT PROCESSING REQUEST. FILEID: E716BE7B-DAC3-424B-B204-1F656FCE7D38, RELATIVEFILEPATH: <ROOT FOLDER>\<PATH>\RP_FRGE_100.DWG, FILEREFERENCES: 0,  
4[FORGE SERVICE] REQUEST ACCEPTED. MANIFESTID: ABB55726-EBF0-4030-88D7-F2BF743EF5CB  
5[FORGE SERVICE] WAIT CONTENT PROCESSING COMPLETION. MANIFESTID: ABB55726-EBF0-4030-88D7-F2BF743EF5CB  
6[FORGE SERVICE] PROCESSING COMPLETED. TENANTID: [TENANT ID], STATUS: COMPLETED, STATUSMESSAGE: ,  
7[FORGE SERVICE] CLEAN TEMPORARY DATA  
8[FORGE SERVICE] DELETE PROCESSING MANIFEST. MANIFESTID: ABB55726-EBF0-4030-88D7-F2BF743EF5CB  
9[FORGE SERVICE] DELETE BLOB FILE. FILEID: E716BE7B-DAC3-424B-B204-1F656FCE7D38  
10[FORGE SERVICE] CLEAN COMPLETED
```

```
11 [RENDERING] RENDER COMPLETED: "<ROOT FOLDER>\<PATH>\RP_FRGE_100.DWG"
```

4. In the **Document** ribbon **Rendition** group, click **Show**.
The **Use Forge integration** page opens.
5. Click the **Show rendition by Forge Native Viewer** link.
The Native Viewer window opens and shows the rendition.

Make the Rendition the Default File Shown

To make the rendition the default file shown when you view a document:

- Set the **View renditions** option as described in [Personal Preferences](#).

View Hotspots and Redlines on PDFTron Rendition


You can opt to view [hotspots](#) by default when you view a rendition or you can toggle hotspots and redlines on or off when viewing a rendition. If you view a rendition of an outdated version, hotspots are not shown.

To view hotspots by default when you view a rendition:

1. Select **your user > Preferences**.
2. Select the **View hotspots** check box.
3. Click **OK**.

Toggle Hotspots and Redlines

To toggle [hotspots](#) and [redlines](#) when viewing a rendition:






1. View the rendition as described earlier on this page.
2. Click the **Hotspot** and **Redline** toolbar button .
3. In the context menu that opens, select **Redlines** and/or **Hotspots** depending on whether you want to show or hide redlines or hotspots.
4. Move the cursor over a hotspot to view properties of the target for that hotspot such as:
 - target identification number
 - tag type
 - tag number
 - target filename

- name and values of properties in the **Hotspot Properties** column. Properties with no value for the target document are hidden.

If there are multiple targets for the hotspot, the box that appears shows **Multiple Targets**. If this occurs, you can [View a target](#) in the **Details** pane that appears when you click the hotspot.

Highlight a Hotspot


To highlight a hotspot in the diagram:

1. In the viewer, click the **Panel** toolbar button .
2. Click the **Hotspots**  button.
The **Panel** pane opens with a list of hotspots.
3. Use the **Zoom In** , **Zoom Out**  or **Marquee Zoom**  buttons to set the zoom level you want.
4. To filter the hotspot list, in the **Search hotspots** field enter the **Asset Number** or **Asset Type** or part of it.
5. Select the hotspot you want to view from the list.
The selected hotspot is highlighted on the drawing in the current zoom.

View a Target

When you view the target of a hotspot, it opens in a new browser tab. A rendition is shown if one exists for that target. If no rendition exists, the document properties are shown.



To view the target of a hotspot:

1. In the viewer, click the hotspot you want to view.
The hotspot is highlighted in the current browser tab. If only one target exists, the target of the selected hotspot opens in a new browser tab. If more than one target exists, the **Details** pane opens with the available targets for that hotspot.
2. If you want to view a target listed on the **Details** pane, click the **View**  button next to that target.
The selected target opens in a new browser tab.

View Layers

When you view a rendition that has layers, the rendition is shown in accordance with the translation rules that have been configured in the Meridian Enterprise Server Administration Console layer translation tables. Layers that were translated as mandatory are always shown and cannot be hidden. Layers translated with the Default option are shown by default.

To change the layers shown on a rendition:

1. In the viewer, click the **Panel** toolbar button .
2. Click the **Layers**  button.

The pane lists the layers that you can show or hide. Mandatory layers are locked and cannot be hidden.

3. Select the check boxes of the layers you want to show.
4. Clear the check boxes of the layers you want to hide.

View Rendition in Default Application

To open the rendition in its default application:

- In the **Edit** ribbon **Upload/Download** group, select **Download Document > Open**.

PowerUser Procedures

Use these steps for [PowerUser](#).

Make the Rendition the Default File Shown

To make the rendition the default file shown when you view a document:

- Set the **Show renditions by default** option as described in [Appearance Options](#).

Switch Viewer between Source Document and Rendition

To switch the viewer from the source document to the rendition or vice versa:

- In the viewer window, click the **Show native/rendition** button .

View Rendition in Default Application

To open the rendition in its default application:



1. In any navigation view, select the document that you want to view.
2. On the **Document** menu, click **Open Rendition**.

Navigate a Document

Following are the ways that you can navigate a document with the document viewer.

Thumbnails



To navigate by thumbnails:

1. Click the **Toggle Side Panel** icon  to open the left side panel if it is not open already.
2. Click the **Thumbnails** icon  to show the thumbnails list if it is not open already.
3. Click the thumbnail in the list of the page that you want to view.

The view refreshes to show the selected page.

Document Outline

To navigate by document outline:

1. Click the **Toggle Side Panel** icon  to open the left side panel if it is not open already.
2. Click the **Outline** icon  to show the document outline if it is not open already.
3. Click the heading in the outline of the page that you want to view.

The view refreshes to show the selected page.

Page Number



To navigate by page number:

- Click the **Previous Page** icon  or **Next Page** icon  to show the page that you want to view.

The view refreshes to show the selected page.




Change the Viewing Area

Following are the ways that you can change the document viewing area in the document viewer.

The viewer works in two modes: pan mode and zoom mode. The pan mode icon is darker  when pan mode is active. The zoom mode icon  is darker when zoom mode is active. Only one mode can be active at a time. You switch modes by clicking the icon of the inactive mode.

Zoom

To use zoom mode, choose one of three options:

- Click and drag a fence around the desired viewing area.
- Click the **Zoom Out** icon  or the **Zoom In** icon  to zoom in steps
- Drag the **Zoom** slider  to zoom dynamically


Pan

To use pan mode:

- Click in the document and drag to show the desired viewing area.



Layout

To change the page layout:

1. Hover the mouse pointer over the **Page Layout** icon  to show the page layout palette.
2. Hover the mouse pointer over a layout icon to show the layout mode in a tooltip.
3. Click a layout icon to select the desired mode.
The view refreshes to show the selected mode.

Fit the page

To make the document fit the page, choose one of two options:

- Click the **Fit Width** icon  to fit the page width within the viewer window.
- Click the **Fit Page** icon  to fit the entire page in the viewer window.
The view refreshes to show the selected mode.

Full screen

To switch to full screen mode:



- Click the **Full Screen** icon .

Search a Document

The document viewer provides two search tools for simple or more advanced searches.



Simple Search

To run a simple search:

1. Type the text that you want to find in the **Search** field.
2. Press **Enter** or click the **Search** icon .
- The first occurrence of the text is highlighted.
3. Click the **Search** icon  repeatedly to jump to each successive occurrence of the text in the document.

Advanced Search

To run an advanced search:

1. Click the **Toggle Side Panel** icon  to open the left side panel if it is not open already.
2. Click the **Full Document Search** icon  to show the search options if it is not open already.
3. Type the text that you want to find in the text box.
4. Click options or type values using the descriptions in the following table.

Search options

Option	Description
Whole word only	Finds only the text that you entered and not alternative forms of the same word.
Case Sensitive	Finds only text that matches the case of the text that you entered.

5. Press **Enter** or click **Go**.
The left side panel lists the occurrences of the text within the document and shows the surrounding context.
6. Click an occurrence to jump to that location in the document.

Compare Files

To compare files, PowerWeb displays a unique viewing page that shows the renditions of the selected documents. The two files can be two revisions of the same rendition file or two similar but unrelated renditions that you want to compare visually. The page allows you to see either of the renditions alone or a simultaneous view of both renditions that displays the additions, deletions, and unchanged objects between the two files in symbolic colors:

- Green — additions
- Red — deletions
- Black — unchanged

To compare files, PowerUser displays a unique multi-pane window. Two of the panes show two files side-by-side. The two files can be two revisions of the same source or rendition file or two similar but unrelated files that you want to compare visually. The area of the files shown in the two panes are synchronized with one another. When you change the view of one file, the view of the other file is changed automatically to match the first file. This makes it easy to compare files without adjusting the views, sizes, and positions of separate windows.

If the files being compared are supported vector (CAD) graphics files, the lower-right pane shows the additions, deletions, and unchanged objects between the two files in configurable colors. The lower-left pane contains options to change the colors. This graphical representation of changes is valuable for quickly determining the differences between two complex files. You can print a hard copy of the differences and also generate a report of the non-graphical differences between two files, for example, layer names, system variables, and so on.

Note:

- Comparing source files is only supported by the AutoVue viewer (available separately). Comparing renditions is supported by the built-in PDFTron viewer or the AutoVue viewer (available separately).
- In Meridian 2021, comparing renditions using the built-in PDFTron viewer does not automatically recalculate the difference after you pan the document. To recalculate the difference, click **Refresh**.
- Graphics that have been moved but that are otherwise unchanged are considered by **Compare** as a deletion from one document and an addition to the other document.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To visually compare two renditions:

1. Select two documents that you want to compare.
2. Choose between two options:
 - Right-click one of the documents, point to **Document**, and then click **Compare Renditions**.
The **Compare Renditions** page appears.
 - In the **Document** ribbon, in the **Action** group, click **Compare Renditions**.
The **Compare Renditions** page appears.
3. Use the options of the page as described below.
4. Click **Exit**.


Compare Renditions page options

Option	Description
Keep in sync	When enabled and you switch from one rendition to the other, the viewing area remains the same so that you don't have to manually match the viewing area of one rendition to the other. When disabled, the viewing area is not synchronized so that you can easily view different areas of each rendition and switch between them.
Rev.<lowest>	Displays only the first rendition.
Rev.<highest>	Displays only the second rendition.
Difference	Displays both renditions simultaneously with the colors indicated by the legend in the bottom right corner of the page.
Refresh	Refreshes the current view to show any changes that have been made to renditions since you first opened the page.
Swap	Reverses the comparison order of the renditions.

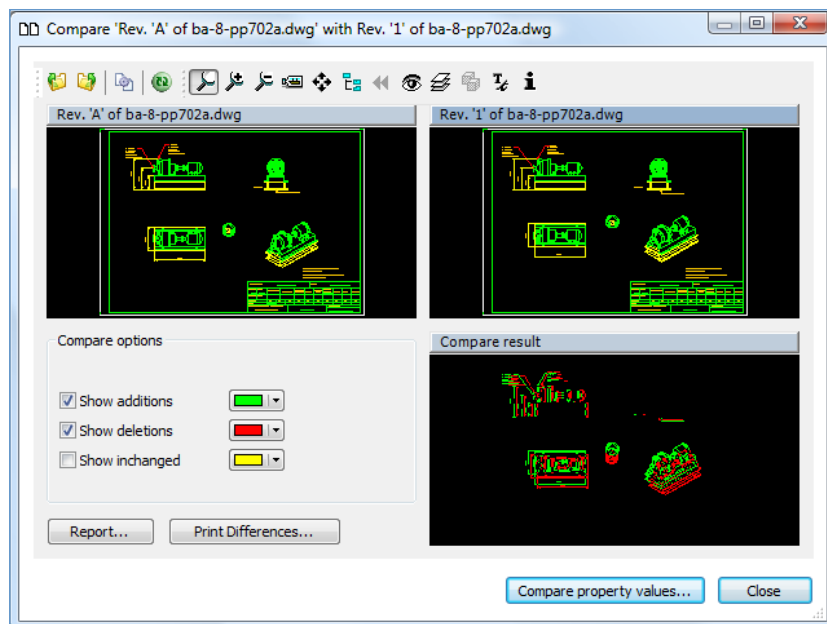
PowerUser Procedures

Use these steps for [PowerUser](#).

To visually compare two files:


1. Use Ctrl+click to select one of the following:
 - Two similar documents from a Navigation view
 - Two revisions of the same document from the **Revisions** dialog
 - One document in a briefcase to compare with its original in the vault. Meridian Enterprise will automatically select the original document
2. Click the **Compare** button .



The **Compare** dialog box appears, similar to the following figure.



3. Use the tools in the toolbar or the shortcut menu to change the view of the documents. All panes remain synchronized on the same area of the documents.

Note:

Automatic pane synchronization is not supported for all formats in all viewer plug-ins, for example, PDF by the AutoVue 2D Professional viewer plug-in. When working with an unsupported combination, click the **Synchronize**  button to manually synchronize the views.

Use the browse buttons   or corresponding shortcut menu commands to load different revisions of the same documents, different documents from the vault, or documents that reside outside the vault for comparison.

4. Click options or type values using the descriptions in the following table.


Compare window options


Option	Description
Show additions	Displays graphics in the right document that do not exist in the left document. Select a color to display additions from the list.
Show deletions	Displays graphics in the left document that do not exist in the right document. Select a color to display deletions from the list.
Show unchanged	Displays graphics that are identical in both documents. Select a color to display unchanged graphics from the list.
Report	Displays a report of the invisible changes between the two documents. The information can be saved to a file where it can be printed. Not available for raster documents. This option is only available if the current viewer is the ICViewPlugin viewer.
Print Differences	Prints the graphics in the Compare Result pane to a printer.
Compare property values	Compares and optional updates the property values of one document with the property values of another document. To compare the property values of the two documents, see Compare Document Property Values .

Copy Text To the Clipboard

The document viewer allows you to copy text from a document to the Windows clipboard so you can paste it in other documents.

To copy text to the clipboard:

1. Click the **Text Select** icon  to switch from pan mode to text selection mode if is not active already.

The mouse pointer appears an I beam icon  when it is over the document area in text selection mode.

2. Click in the document and drag to select the desired text.
3. Click **Copy**.

The text is copied to the clipboard.

Print a Document

The Meridian document viewer allows you to print all or selected pages of a document to any Windows system printer.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Before printing a document, you can zoom to a particular part of the document and then you can use the **Print view** button on the **Print** dialog box to print that view.

Note:

When you print a document whose source is a PDF, and the PDF does not have a rendition, PowerWeb prints the source PDF instead of generating a rendition.

If the PDF has a rendition, PowerWeb will print the rendition.

To print a document:

1. Click the **Print** toolbar button.

The **Print** dialog box opens.

2. Select the print options you want:

- **All** — All pages.
- **Current** — Current page.
- **Page numbers** — Enter specific page numbers to print separated by commas such as 1,2,5 or enter a range of pages for example 2-6. Total indicates the number of pages to be printed.
- **Include Comments** — Include comments on the printout. This has no effect when printing a view.
- **Include Annotations** — Include annotations on the printout. This has no effect when printing a view.

3. Choose between two options:

- If you want to only print the current view, click **Print view**.
- Otherwise, click **Print**.


The browser print dialog opens. If the document is configured to so, a watermark appears on the printed document.

4. Click **Print**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To print a document:

1. Click the **Print** button .
The **Pages** dialog box appears.
2. Select **All** to print the entire document or type page numbers separated by commas (**1,2,5**, for example) or type a page range (**1-5**, for example) in the text box.
Total updates to indicate the number of pages that will be printed.
3. Click **Print**.
A progress bar updates as the specified pages are prepared for printing and the Windows **Print** dialog box appears.
4. Select the printer where you want to send the pages, set other options as necessary, and click **Print**.
The specified pages are printed on the selected printer.
5. Repeat steps 2 to 4 if you want to print additional pages or click **Done** if you are finished printing.

View and Reply To Notes


Notes are the text of the text-type annotations described in [Annotate a Document](#):


- Free text
- Callouts
- Comment Notes
- Text that can be added to any non-text annotation

Notes appear in the **Notes** panel in the document viewer. The text of the notes also appears in the **Comments** or **Collated Comments** list on the **Document Details** page of the document.

View Notes

To view the notes for a document:


1. Open the document in the document viewer.
2. Click the **Toggle Notes Panel** icon  at the right end of the toolbar if the panel is not already open.

Be careful to not confuse it with the similar looking **Comment Note** icon  in the annotation tools palette. The **Notes** panel opens and lists all of the notes that have been added to the document.

3. Click a note box to see the annotation to which it is attached.

Change Sort Order

To change the sort order of notes:

1. Click the note options icon .
The note options panel appears.
2. Choose between two options:
 - Click **Document** to sort the notes panel according to the location of the notes in the document.
 - Click **Time** to sort the notes panel according to the time in which the notes were added to the document.

Search in Notes

To search in notes:

- Type keywords in the search box.
The matching text is highlighted in the note boxes.

Show or Hide Annotations

To show or hide the annotations:

- Click the **Show/Hide** button to toggle the visibility of the annotations.

Reply to a Note

To reply to a note:


1. Type in the text box that shows the prompt **Enter a reply**.
2. Click **Reply**.

Save Changes

To save changes to the notes:

- Click **Save**.


Annotate a Document

The document viewer provides a rich set of tools to add annotations to documents as follows. The tools appear in the toolbar at the top of the viewer. If the tool you want to use is not visible, click the **More Tools** icon  to show the tool palette so that you can select it.

After you add each annotation, a note box appears in the **Notes** panel with your name, the type of annotation, and the date and time that you added the annotation. You can click **Edit** in the note box to enter or edit a note for the annotation. Click **Delete** in the note box to delete the annotation.

Free Text

To add text:

1. Click the **Free Text** icon .
2. Click in the document where you want to place the text.
3. Drag the cursor to draw a bounding box that indicates the shape and size of the area where you want the text to appear.
The text **Insert text here** appears highlighted.
4. Type the text that you want to add.
You may press enter to type multiple lines.
5. When you are finished typing, click outside the text area.


Highlight Document Text

To highlight document text:

1. Click the **Text Highlight** icon .
2. Click and drag the cursor to highlight existing text within the document.

Draw Freehand

To draw freehand:

1. Click the **Free Hand** icon  .
2. Click and drag the cursor to draw freehand.

Text Underline

To underline text:

1. Click the **Text Underline** icon  .
2. Click and drag the cursor to underline existing text within the document.


Text Strikethrough

To strike through text:

1. Click the **Text Strikeout** icon  .
2. Click and drag the cursor to strikeout existing text within the document.


Text Squiggly Underline

To add a squiggly underline to text:

1. Click the **Text Squiggly Underline** icon  .
2. Click and drag the cursor to add a squiggly underline to existing text within the document.


Arrow

To add an arrow:

1. Click the **Arrow** icon  .
2. Click to place the location of the arrowhead and then drag the cursor to draw the leader.


Line

To add a line:

1. Click the **Line** icon  .
2. Click to place one end of the line and then and drag the cursor to place the other end.


Signature

To add a signature:

1. Click the **Signature** icon  .
2. Click the location where you want to place your signature.
The signature dialog box appears.
3. Draw your signature with the cursor above the horizontal line.
4. Enable **Make Default Signature** to save the current signature as the default so that you can reuse it.
5. Click **Add Signature**.
Your signature appears at the selected location.


Comment Note

To add a comment note:

1. Click the **Comment Note** icon  .
2. Click the location where you want to place the note.
The note is highlighted in the **Notes** panel.
3. Type text in the text box and click **Save**.

Callout


To add a callout:

1. Click the **Callout** icon  .
2. Click once to place the location of the arrowhead.
3. Click a second time to place the location of the leader vertex.

4. Click a third time to place the location of the callout text.
5. Type the callout text.
You may press enter to type multiple lines.
6. When you are finished typing, click outside the text area.


Rectangle

To add a rectangle:

1. Click the **Rectangle** icon .
2. Click and drag to draw a rectangle.


Ellipse

To add an ellipse:

1. Click the **Ellipse** icon .
2. Click and drag to draw an ellipse.


Polygon

To add a polygon:

1. Click the **Polygon** icon .
2. Click to indicate the location of each vertex.
3. Double-click to finish drawing.


Polyline

To add a polyline:

1. Click the **Polyline** icon .
2. Click to indicate the location of each vertex.
3. Double-click to finish drawing.

Edit Annotation

To edit an annotation:


1. Click the **Edit Annotation** icon .
2. Click the annotation that you want to edit.
3. Continue as described in [Modify an Annotation](#).

Modify an Annotation

A common set of editing tools is available to modify any annotation type, regardless of the current annotation tool.

Resize or Move Annotation

To resize or move an annotation:

1. Click the annotation that you want to edit.
The original bounding box is highlighted.
2. Click a grip  and drag it to resize the bounding box.
3. If the annotation is not applied to text in the document itself, you can click inside the bounding box and drag the annotation to move it to a different location.

Edit Text Annotation

To edit a text annotation:

1. Click the annotation that you want to edit.
The original bounding box is highlighted.
2. Click **Edit Text** to edit the text.

Add Note to Non-Text Annotation

To add a note to a non-text annotation:

1. Click the annotation to which you want to add a note.
The original bounding box is highlighted.
2. Click **Note**.
The note is highlighted in the **Notes** panel.
3. Type text in the text box.
4. Click **Save**.

Change Style of Annotation

To change the style of an annotation:

1. Click the annotation that you want to modify.
The original bounding box is highlighted.
2. Click **Style** to set the text color, size, background color, margins, and opacity.


Delete Annotation

To delete an annotation:

1. Click the annotation that you want to delete.
The original bounding box is highlighted.
2. Click **Delete**.

Modify Multiple Annotations

To modify multiple annotations:

1. Click the **Edit Annotation** icon .
2. Click and drag a fence that intersects the annotations that you want to edit.
The bounding boxes of all the selected annotations appear and the note boxes in the **Notes** panel are highlighted.
 - Type text in the note box of each annotation.
 - Click and drag to move the annotations.
 - Click **Delete**.

Update Renditions

Renditions are typically updated automatically when an updated source document is released from a workflow. However, there may be circumstances in which you want to update renditions without initiating a workflow or editing the source documents, such as:

- You have replaced the content of the source document with a file from an outside organization
- You receive updated renditions from an outside organization and will not receive an updated source document until later
- Your organization does not use workflow definitions for the source document workflows; automatic updating is not supported by the Quick Change or document type workflows.
- You synchronize Meridian properties to a drawing title block and need to update the rendition to reflect the new values.

In these and similar circumstances, you can update renditions manually.

How the rendition will be created depends on the configuration of the publishing job that is assigned to the vault by a System Administrator and on the properties on the **Rendition** tab of the document. When the update will occur depends on the configuration of the publishing job.

The **Update Rendition** action triggers the publishing job configured for the **Create Rendition** setting in your vault settings. This setting is described in *Configure a Vault For Publisher* in the *Meridian Enterprise Configuration Guide*.

When rendering has completed, the new rendition will appear in the viewer. For information about setting the rendition properties and monitoring the Publisher queue, see [View the Publisher Queue](#).

Notes About Functionality

- The document will be locked by the **Rendition Server** account until the rendition has completed.
- Only documents that are unlocked in your local workspace or that are already locked by the **Rendition Server** account may have their renditions updated.
- The resulting rendition may contain additional information such as an electronic signature page or a watermark, depending on your system's configuration.
- If **Enable XOD Viewing** is turned off, updating a rendition may fail if EDM server and Meridian Enterprise Server are located on the same machine, and Content Indexing (Windows Search) is ON.

The **Enable XOD Viewing** setting is described in the *Configure the Viewer Options* article in the *Meridian Enterprise Server Administrator's Guide*.

To address this issue, you can adjust the **RetryWriteRendition** and **WaitWriteRendition** settings. Learn more about these settings in the *Configure a Vault For Publisher* article in the *Meridian Enterprise Administrator's Guide*.

- If rendering certain Revit files (.rvt) consistently leads to any error which does not seem applicable, check if opening the .rvt file in the Revit version installed on the render node causes an upgrade dialog to appear. If so, the file should be upgraded in an interactive Revit session before trying to render again.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To update a rendition manually:

1. Select the document for which you want to update its rendition.
2. Choose one of the following options:
 - On the **Document** ribbon, in the **Rendition** group, click **Update Rendition**.
The document is added to the Publisher queue for rendering.
 - Right-click the document, then select **Document > Rendition > Update Rendition**.
The document is added to the Publisher queue for rendering.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Document > Rendition > Update Rendition**.
The document is added to the Publisher queue for rendering.

PowerUser Procedures

Use these steps for [PowerUser](#).

To update a rendition manually:

1. Select the document for which you want to update its rendition.
2. On the **Document** menu, select **Update Rendition**.
The document is added to the Publisher queue for rendering.

Print Renditions

You can print renditions using the viewer and output them to a Windows system printer.

Note:

Printing a batch of renditions requires the installation of Adobe Reader and a site cache connection. In the 2022 release, if you print documents in a batch, Meridian will call the appropriate script and apply the [watermark](#) in PDFTron. The **Site Cache Client** is required for this functionality. A minimized Adobe Reader window might remain after printing and must be closed manually.

If the rendition of the document was created using the Forge engine, an error message might appear.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To print renditions:

1. Select the documents for which you want to print renditions.
2. On the **Document** menu, select **Print Renditions**.
The **Print Renditions** dialog box appears.
3. Select or type options for the desired printer and then click **OK**.

The **Print Renditions** dialog shows the progress while the rendition of the selected documents are printed using the viewer.

Attach Renditions

Attaching a rendition imports a file into the vault and stores it with the selected document's source content. The new file will then be shown as the document's rendition.

The document to which you want to attach a rendition must be under change by you.

Important!

The attached file might be overwritten if a new rendition is generated automatically by the system as the result of a workflow transition or manually as described in [Update Renditions](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To attach a file as a rendition:

1. In any navigation view, right-click the name of the document for which you want to attach a rendition, point to **Rendition**, and then click **Attach Rendition**.

The **Attach Rendition** dialog box appears.

2. Click **Browse** and select the file that you want to attach.
3. Click **Yes**.

The file is attached and replaces the current rendition, if any.

PowerUser Procedures

Use these steps for [PowerUser](#).

To attach a file as a rendition:

1. In any navigation view, drag a file from outside the vault and drop it onto the destination document's name in the view.

The shortcut menu appears.

2. Select **Attach as Rendition**.

The file is attached and replaces the current rendition, if any.

Download Renditions

Downloading a rendition makes a copy on your PC that you can work with when you are not logged on to Meridian.

Note:

If in site cache mode and the **ActiveX compatibility mode** option is enabled as described in [Personal Preferences](#), only the selected document is downloaded.

If the rendition of the document was created using the Forge engine, an error message might appear.

Use these steps for [PowerWeb](#).

To download renditions to a specific location on your computer:

1. In any navigation view, select the documents for which you want to download their renditions.
2. Choose one of the following options:
 - In the **Edit** ribbon, in the **Download** group, click the down arrow next to **Download to Folder** and then click **Download Renditions to Folder**.
The **Meridian Upload/Download Control** dialog box appears.
 - Right-click your selection, point to **Edit**, and then click **Download Rendition**.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Point to **Edit** and then select **Download Rendition**.
3. Select the desired options and then click **OK**.

The renditions download to your computer in the background.

Unlock Renditions

While a rendition is being generated by the system, renditions are locked by the **Rendition Server** account so that the rendition files can be replaced. This prevents the source document from being routed in a workflow. If rendering fails for some reason, the rendition may remain locked. The lock must be released manually in such cases.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To unlock a rendition:

1. Select the document for which you want to unlock its rendition.
2. In the **Document** ribbon, in the **Rendition** group, click **Unlock Rendition**.
The rendition is unlocked.

PowerUser Procedures

Use these steps for [PowerUser](#).

To unlock a rendition:

- Choose between two options:
 - To unlock a rendition from the Document menu:
 1. Select the document for which you want to unlock its rendition.
 2. On the **Document** menu, select **Unlock Rendition**.
The rendition is unlocked.
 - To unlock a rendition by right-clicking:
 1. Right-click the document for which you want to unlock its rendition.
 2. Select **Unlock Rendition** on the shortcut menu that appears.
The rendition is unlocked.

Publisher Queue

Publisher is a component of Meridian Enterprise Server for publishing (copying) documents from one document management system to another. Publisher can optionally render documents from the source system to a different file format before publishing them to the destination system. Lastly, the system can add watermarks to renditions (including the prior revision), append electronic signature pages to the final output, and merge related renditions into a single file.

Publisher combines these actions—rendering, post-processing, and publishing—in a *publishing job* that it can run either on demand or as a scheduled task. Publisher includes links to common document management systems. Publisher also includes rendering modules for popular engineering content authoring applications. Publisher is configured and publishing jobs are created using the Meridian Enterprise Server Administration Console, the central tool for managing several Accruent applications.

Publisher includes application links that can be installed to simplify publishing documents from within source document management systems, such as Meridian Enterprise, SharePoint, Accruent Project Portal, and a Windows file system. The links add documents to the publishing queue that can be managed through a website installed on the Meridian Enterprise Server computer. The queue can be viewed and controlled using a web browser from anywhere on the network.

The following topics describe how to manage the Publisher queue to publish documents.

View the Publisher Queue

The Publisher queue lists documents that have been submitted for rendering and/or publishing. This is the most useful way to see the documents that are waiting to be published by the next scheduled publishing job. The queue holds all documents to be published regardless of how they were added to the queue, automatically or manually from any source system. You can also view the queue to see what documents have already been published or that failed to publish for some reason and details (the process log) for each document.

You will only see jobs in the Publisher Queue that originated from the current vault.

Note:

You may not modify a publishing job if you are not the job owner or a member of the **Publisher Configurators** group or the **Application Administrators** group as described in the *Publishing Jobs* chapter in the *Meridian Enterprise Server Administrator's Guide*.

(PowerWeb) Open the Publisher Queue

Use these steps for [PowerWeb](#).

To open the Publisher Queue:

- In the **Vault** ribbon, in the **View** group, click **Publisher Queue**.

The **All Queue** page appears and lists all of the documents currently in the queue regardless of their status.

To open the Publisher queue in a new web browser window:

1. Open Internet Explorer.
2. Type the following address where <**PublisherComputerName**> is the name of computer where Meridian Enterprise Server is installed:

```
http://<PublisherComputerName>/BCEnterprise/Queue
```

3. Press the **Enter** key on your keyboard.

The **All Queue** page appears and lists all of the documents currently in the queue regardless of their status.

(PowerUser) Open the Publisher Queue

Use these steps for [PowerUser](#).

Internet Explorer must be configured as your default web browser or the following error may occur: **Cannot start process because a file name has not been provided.**

To open the Publisher queue:

- On the **Tools** menu, click **Open Publisher Queue**.

The **All Queue** page appears and lists all of the documents currently in the queue regardless of their status.

View Document Status

To view the current status of a particular document:

- Select the document in the queue list.

The current status appears in the **Status** group on the right side of the page. Below the status is the **Process Logs** group that shows all of the processing activity and can be used for troubleshooting.

View Jobs with Specific Status

To view only the jobs with a specific status:

- Click the name of the status in the menu.

The page refreshes to show only the jobs with the selected status.


View Jobs with Specific Property Value

The properties that can be searched are configurable as described in [Configure the Queue Display Options](#).

To view only the jobs with a specific property value:

1. Type at least the beginning of the property value in the search box.

The search operator that will be used is **Starts With**.

2. Click the search icon .

The list refreshes to show the results of your search.

3. To reset the filter results, clear the search box and click the icon again.

Filter the List

The properties that can be filtered on are configurable as described in [Configure the Queue Display Options](#).

To filter the list:

1. Click the downward arrow ▾ to the right of the column name that you want to filter on.
2. Point to **Columns**.
3. Select or deselect columns accordingly.

Sort Column

To sort the jobs on a particular column:

1. Click the heading of the column that you want to sort on.
The sort icon ▾ indicates the current sorting column and direction.
2. To reverse the sort order, click the heading again.

Change Column Order

To change the order of columns:

- Drag a column heading and drop it in the desired position.

Show or Hide Columns

To show or hide columns:

1. Click the downward arrow next to any column name.
2. Point to **Columns**.
3. Select or deselect columns accordingly.

View Job Details

To view the details of a job:

- Click the icon of the job.

The details of the job appear in the right pane. The properties that are shown in the **Other** group are the ones that are selected in the **Details** column as described in [Configure the Queue Display Options](#).

The data that is listed in the **Process Logs** group is output from the publishing job if it has run already. If multiple attempts were made to publish the document, the data for each attempt is collapsible and expandable and the last attempt is expanded by default. Any error messages appear in red text.

Edit the Rendition Properties

How renditions are generated is controlled by a set of properties for each document. You can modify these properties to meet your specific rendition requirements.

Notes About Functionality

- Publisher supports hybrid document publishing and rendering when the source and destination systems are both Meridian Enterprise. It is supported only if no rendering is performed or if the AutoCAD rendering module is used. Hybrid parts are not rendered or published if the AutoVue rendering module is used.
- These properties only affect renditions created by Publisher rendering jobs. They do not affect viewing PDF source documents, which uses the default settings and are not configurable.
- These properties may be set for batches of documents using the **Set Property Value** command described in [Set a Property Value](#). However, in PowerUser only the properties with lookup lists are available for setting. They are all available in PowerWeb. You may not set unlisted values for properties with lookup lists even if you have the privilege to do so. No error message will be displayed and the value will not be changed.

Procedures

Use these steps for [PowerUser](#) and [PowerWeb](#).

To edit the properties of a document that control how it is rendered:

1. Select the document for which you want to edit its rendition properties.
2. Click the **Rendition** tab.
The **Rendition** property page appears.
3. Click **Edit**.
The properties become editable.
4. Click options or type values using the descriptions in the following table.
5. Click **OK**.

Rendition properties

Property	Description
Page Layout	The view within the source document to render.
Page size	<p>The size of the page to render to. The available sizes are those that are defined on the Meridian Enterprise Server computer where the document will be rendered. Select ~Not specified~ to use the page size specified in the source file (AutoCAD Page Setup Manager only).</p> <p>If ~Not specified~ is selected and an electronic signature watermark will be applied to the rendition, the default watermark settings for location and font size are used. The default page size is A0.</p>
Page orientation	<p>The orientation of the page to render to: Landscape (default) or Portrait. Select ~Not specified~ to use the page orientation specified in the source file (AutoCAD Page Setup Manager only).</p> <p>If ~Not specified~ is selected and an electronic signature watermark will be applied to the rendition, the default watermark settings for location and font size are used.</p>
Render color	The color depth to render to: Color or Black and white (default).
Pen settings file	<p>An AutoVue pen settings filename to apply to the rendition. File names are those that are available on the Meridian Enterprise Server computer. Applicable only if the publishing job is configured to use the AutoVue rendering module. For information about the available pen settings files, consult a System Administrator.</p> <p>Select ~Not specified~ to use the pen settings file specified in the source file (AutoCAD Page Setup Manager only).</p>
XOD Resolution	<p>Select a value at which to view and generate renditions with PDFTron. Lower values may lack sufficient clarity. Higher values may cause slower viewing and publishing.</p> <p>This setting is only relevant if you have the Enable XOD Viewing setting enabled. This setting allows users to view XOD files instead of native PDFs in PDFTron. To learn more about this setting, see the <i>Configure the Viewer Options</i> section of the <i>Meridian Enterprise Server Administrator's Guide</i>.</p>

Property	Description
Print Quality	<p>Print quality to use with PDFTron. You can enter a value between 1 and 15. Higher values result in higher quality, but takes longer to render. Values between 3 and 6 are suitable for most purposes. Beyond 6, quality increases by diminishing amounts.</p> <p>If no value is set, the default value of 1 is used.</p> <p>Note: If you have the Enable XOD Viewing setting enabled, you should not enter a value greater than 7 for the print quality setting. This causes the Print dialog to freeze and the rendition not to be printed.</p>
Layer translation table	<p>Layer translation table to use for translating the document layers when generating a PDF rendition from the document. Translation tables are created by your administrator in the Meridian Enterprise Server Administration Console. Depending on the configuration your System Administrator has chosen, you can choose from the layer translation tables available for your vault.</p> <p>This field is hidden if the vault has no layer translation tables.</p>

Publish Documents From a Windows Folder

Publisher supports the Windows file system as a source for publishing documents. A System Administrator configures a service running on a Windows file server to monitor a specified folder. When documents are created or moved to that folder, the service automatically registers them for publishing. Consult a System Administrator for the locations of folders that are configured for publishing.

Use these steps for [PowerUser](#).

To publish documents from a Windows folder:

- Choose between two options:
 - Save new documents to the folder from any authoring application.
 - Copy or move documents to the folder using any method that Windows supports.

Note:

If the documents contain references to other files, those files must also reside in the same folder.

When the publishing will occur depends (among other factors) on the configuration of the publishing job that is assigned to the vault by a System Administrator.

You can view the documents that you submitted as described in [View the Publisher Queue](#).

After the documents have been successfully published, they are moved to the `Published` sub-folder.

Cancel a Document

Canceling a document in the Publisher queue prevents it from being published to the destination system. The document's registration remains in the Publisher database for auditing and other purposes. A canceled document may be restarted for publishing at a later time unless it is marked as obsolete as described in [Mark a Document As Obsolete](#).

Use these steps for [PowerUser](#) and [PowerWeb](#).

To cancel a document:

1. Open the Publisher queue as described in [View the Publisher Queue](#).

2. Select the documents that you want to cancel.

Press and hold the Ctrl key while clicking to select individual items. Press and hold the Shift key while selecting the first and last of a range of items.

3. In the toolbar, click **Cancel**.

The status of the document changes to **Canceled**.

Restart a Document

A document with a **Status** of **Failed** or **Canceled** can be restarted. Restarting a document activates it for publishing once again. Only users with Administrative rights or the owner of a document can restart a failed document.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To restart a document:

1. Open the Publisher queue as described in [View the Publisher Queue](#).
2. Select the documents that you want to cancel.

Press and hold the Ctrl key while clicking to select individual items. Press and hold the Shift key while selecting the first and last of a range of items.

3. In the toolbar, click **Restart**.

The status of the document changes to **Pending**.

Mark a Document As Obsolete

Marking a document as obsolete prevents it from being published. This action is typically done when the document has been added to the queue more than once and the Publisher has not been configured to ignore duplicates. When the document has been published successfully once, the other registrations in the queue should be marked obsolete to prevent overwriting previous files on the destination system. The document's registration remains in the Publisher database for auditing and other purposes.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To mark a document as obsolete:

1. Open the Publisher queue as described in [View the Publisher Queue](#).

2. Select the documents that you want to mark as obsolete.

Press and hold the Ctrl key while clicking to select individual items. Press and hold the Shift key while selecting the first and last of a range of items.

3. In the toolbar, click **Obsolete**.

The status of the document changes to **Obsolete**.

For information about reversing this change, see [Unmark a Document As Obsolete](#).

Unmark a Document As Obsolete

Unmarking a document as obsolete allows it to be restarted for publishing. This reverses the effect described in [Mark a Document As Obsolete](#).

Use these steps for [PowerUser](#) and [PowerWeb](#).

To unmark a document as obsolete:

1. Open the Publisher queue as described in [View the Publisher Queue](#).

2. Select the documents that you want to unmark as obsolete.

Press and hold the Ctrl key while clicking to select individual items. Press and hold the Shift key while selecting the first and last of a range of items.

3. In the toolbar, click **Undo Obsolete**.

The state of the document reverts to its previous status.

Configure the Queue Display Options

By default, the Publisher Queue shows basic information that is suitable for most uses. You may configure the display differently to meet your own requirements.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To configure the queue display options:

1. Open the Publisher Queue as described in [View the Publisher Queue](#).

2. In the app bar, click **Settings**.

The **Queue Options** dialog box appears. Each row shows the names and display options for each property in the queue.


3. Select a row that you want to configure.

4. Click options or type values using the descriptions in the following table.

5. Click **OK**.

The queue page is refreshed to reflect your changes.

Publisher Queue display options

Option	Description
Rename	To change the name that is shown for a property in the column heading: <ol style="list-style-type: none"> 1. Click the edit icon . The Rename dialog box appears and shows the current display name of the property. 2. Edit the name and click Rename. The property display name updates.
Grid	Shows the property in the queue grid on the left side of the page.
Details	Shows the property in the Other group on the right side of the page when a document is selected.
Filter	Enables the property to be a filter as described in View the Publisher Queue .
Autoload	For better performance, loads unique values in the property filter list when the page loads instead of when the filter is configured. Enable this option if the property contains many unique values and the Filter option is also enabled.
Searchable	Enables the property to be searched as described in View the Publisher Queue .

Option	Description
Display Name	The name of the property as it appears on the queue page.
Name	The internal name of the property used by the system.

Build a Report

You can build reports based on report definitions configured by a System Administrator. A report can be based on the documents contained within a folder in the **Folders** view or on a selection of documents in any navigation view.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To build a report:

1. Choose between two options:
 - Browse in the **Folders** view to the folder containing the documents you want the report to contain.
 - Select the documents that you want the report to contain in any Navigation view.
2. Right-click the folder name or selection, point to **Folder** or **Selection** accordingly, and select **Build Report**.

The **Build Report** dialog box appears.

3. Click options or type values using the descriptions in the following table.

Report generation options

Option	Description
Select a report	Select a report definition from the list. This option specifies which document or folder properties are included in the report.
Report format	Select an output format for the report: <ul style="list-style-type: none"> • CSV — Comma Separated Values format for import into other applications • XML — eXtensible Markup Language format for import into other applications • HTML — Hypertext Markup Language that can be opened in a web browser already styled and ready to print or send to others If the HTML option is grayed out, it means that your System Administrator needs to specify an XSLT stylesheet for the report template. This setting is described in the <i>Format Report Output</i> article in the <i>Meridian Enterprise Configuration Guide</i> .

Option	Description
Report scope	Verify that the report scope is correct. If necessary, click Cancel and modify your selection.
Recursively	Includes the documents contained within sub-folders of the selected folder. This option is only available if a folder is selected.

4. Click **OK**.

The report file downloads to your PC where you can save, open, or print the report.

5. In the **File Download** dialog that appears, click **Save** if you want to save the report file on your computer.
6. Click **Open** if you want to open it immediately for viewing or printing.

PowerUser Procedures

Use these steps for [PowerUser](#).

To build a report:

1. Choose between two options:
 - Select the folder in the **Folders** view that contains the documents you want the report to contain.
 - Select the documents that you want the report to contain in any Navigation view or saved search.

Click **Select All** on the **Edit** menu or press Ctrl+A to select all documents in the current view.

2. Right-click the folder name or selection and select **Build Report** from the **Folder** or **Document** menu, respectively.

The **Select Report** dialog box appears, listing the available report definitions.

3. Click the name of a report definition from the list and then click **Select**.

The **Build Report** dialog box appears.

4. Select options using the descriptions in the following table and click **Generate**. The report data is output to a file or the application, depending on the format selected.

All of the output formats produce a report that contains mostly metadata about the documents in the scope of the report except for Microsoft Word templates. These templates can include additional formatting, text, graphics, and even thumbnail images of the documents. Microsoft Word report templates can only be configured by a System Administrator.

Note:

The **Text File** output format can be used to create scripts for use by other applications such as AutoCAD. Such scripts can be used to process batches of vault documents for plotting, conversion, and other automation tasks.

Report generation options

Option	Description
Select the scope of the report	Select the documents that will be included in the report. If you want to include the documents contained within sub-folders of the current selection, select the (Recursively) option.
Select the format of the report	Lists the standard output formats and any Microsoft Word report templates defined. Select one output format.
Save report in	Enabled if one of the output formats that create an output file (as opposed to sending output to the application) is selected. Type or select a location for the report output file.
Add to existing report	Adds output from the current report to existing output from a previous report.
Open report when done	If one of the output formats that create an output file (as opposed to sending output to the application) is selected, opens the resulting file in its default application.
Copy documents to Local Workspace	Copies the documents that are within the scope of the report to your local workspace so that you can work with them.

View And Save the Audit Log

The audit log is a record of the significant events that have occurred in the vault over time. Each event in the log contains the date, user, action, item, and additional details. It can be useful to track user, document, project activity and more.

As of the 2022 release, separate events are added to the audit log for each document in a batch, regardless of whether authentication succeeded, failed, or if you exited out of the authentication dialog without attempting to authenticate.

If enabled for a vault, the Meridian Enterprise FDA Module allows you to view and save audit log data if you have the appropriate permission. You do so by opening the audit log viewer from within Meridian Enterprise. The audit log viewer opens in a new browser window. There you can filter and sort the data to meet your needs. You can then save the data as a file that you can open in other programs such as Microsoft Excel to format and print the data.

Note:

You must have the **View Audit Log** privilege to use this command as described in the *Security Privilege Descriptions* article in the *Meridian Enterprise Configuration Guide*.

(PowerWeb) View Audit Log Data

Use these steps for [PowerWeb](#).

To view the audit log data:

- In the **Vault** ribbon, in the **View** group, click **Audit Log**.
A new window containing your audit log data opens.

(PowerUser) View Audit Log Data

Use these steps for [PowerUser](#).




To view the audit log data:

- On the **Tools** menu, click **View Audit Report**.
A page titled **Audit Log** opens in a browser window similar to the following figure.
The log entries are sorted on the column indicated by the arrow icon ↓ in the column heading. Your privileges to view the audit log are shown at the bottom of the page.

(PowerUser) Change Sort Order or Select a Filter

Use these steps for [PowerUser](#).

To change the sort order or select a filter:

- Point to a column heading, click the arrow button  that appears, and click the sort option or filter that you want on the shortcut menu that appears.
If you selected a sort option, the arrow icon  appears in that column heading. If you selected a filter, the filter icon  appears in that column heading.

Save Current Audit Log Data

Use these steps for [PowerUser](#) and [PowerWeb](#).

To save the current audit log data:

1. If necessary, arrange, sort, and filter the data as described in the preceding task.
2. Click **Export**.
Your web browser will attempt to download the file to your computer. If your browser's security settings block the download, you might need to adjust the settings and retry this procedure.
3. Accept the default location and filename or specify a different location or filename, if necessary.
The file is saved.
4. Open the file in any program that is compatible with `.xlsx` files to format and print the data.

Folders

A Meridian vault may contain an unlimited number of folders. Meridian Enterprise folders work very similar to Windows folders. Anything that you can do to a Windows folder, you can do to a Meridian folder:

- Create and rename
- Copy and move
- Delete and restore
- Assign inheritable security to the contents

But Meridian folders are also capable of doing much more than Windows folders:

- The name can be calculated automatically
- The properties of a document can be determined by its parent folders
- They can have custom properties, such as **Project Number**
- Commands run on a selected folder can apply to all of the documents in the folder
- A special type of folder called a *project folder* can have a workflow associated with it similar to a document workflow. The workflow can be interlocked with the workflow of the child documents or with the workflow of the parent folder. This requires the Meridian Advanced Project Workflow Module.
- They can be linked to a shared network location where multiple users can edit copies of the same files with certain multi-user applications. The files are automatically synchronized with the vault copies.

Create a Folder

This article describes how to create a folder.

You must have the **Create folder of this type** privilege to create folders using custom types as described in the *Security Privilege Descriptions* article in the *Meridian Enterprise Configuration Guide*.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To create a new folder:

1. Navigate to the folder that you want to be the parent of the folder you are about to create.
2. Right-click the folder, point to **New**, and then click **New Folder** on the shortcut menu.

The **Create New Folder** dialog box displays the path of the current folder, which will become the parent of the new folder.

3. Type the new folder name and click **OK**.

The new folder is created and selected.

PowerUser Procedures

Use these steps for [PowerUser](#).

Create New Folder

To create a new folder:

1. Navigate to the folder that you want to be the parent of the folder you are about to create.
2. Right-click the folder and select **New Folder** on the shortcut menu.

The new folder is created and the name is editable.

3. Type the new folder name and press **Enter**.

Configure Shared Workspace Folder Options

To configure the options for a shared workspace folder:

- Edit the options in the **Sharing details** group on the **Folder** tab of the folder as described in the *Configure Shared Workspaces* article in the *Meridian Enterprise Configuration Guide* .

You must have the **Edit shared workspace settings** privilege to modify the options as described in the *Security Privilege Descriptions* article in the *Meridian Enterprise Configuration Guide*.

Rename Folder

This article describes how to rename a folder. You cannot change a folder name if it is included in a field-path definition or if any document contained in the folder is under change or locked.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To rename a folder:

1. Choose one of the following options:
 - From the ribbon:
 - a. Select the folder you want to rename.
 - b. In the **Edit** ribbon, in the **Organize** group, click **Rename**.
The **Confirm Folder Rename** dialog box displays.
 - From the context menu:
 - a. Navigate to the folder that you want to rename.
 - b. Right-click the folder and point to **Edit > Organize > Rename**.
The **Confirm Folder Rename** dialog box displays.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder.
 - b. Point to **Edit > Organize > Rename**.
The **Confirm Folder Rename** dialog box displays.
2. Type the new folder name in **New name of the folder**.
3. Click **Yes**.
The folder is renamed.

PowerUser Procedures

Use these steps for [PowerUser](#).

To rename a folder:

1. Select the folder that you want to change.
2. Click the **Edit** menu in the toolbar and select **Rename**.
Alternatively, you can press **F2** on your keyboard.

The folder name becomes editable.

3. Rename the folder.
4. Click off the folder or press **Enter** on your keyboard.

The folder is renamed.

Assign Security Roles To a Folder

Folder security may be inherited from its parent folder or explicitly defined for the folder. All of the role assignments for a folder and its sub-folders may be exported, cleared, and imported as a batch.

For information on configuring security roles, see *Manage Security Roles* in the *Meridian Enterprise Configuration Guide* and *Role-Based Security* in the *Meridian Enterprise Administrator's Guide*.

Assigning roles to a folder is typically reserved for System Administrators who know what privileges have been enabled for each role in a vault. If you do not know the capabilities of each role, consult a System Administrator before proceeding.

You must be a member of a group that has the **Assign Roles** privilege to perform this task.

Notes About Functionality

- If no roles are assigned to a vault, then no security restrictions are applied and everyone has full access to all documents in the vault. As soon as one role is assigned to the vault, that is the only role with access to the vault until other roles are assigned. We recommend that you first assign at least yourself to the role with the most privileges for the root level of the vault before assigning any other roles. This will prevent locking yourself out of the vault or from not being able to modify roles and role assignments. The role should have the **Change configuration** privilege in the **Vault** group and the **Assign roles** privilege in the **Folder** group.
- If **Inherited from parent folder** is enabled, the roles list is empty, and the folder has the same role assignments as its parent. This parent folder might inherit its roles from its parent, and so on, all the way up the folder tree to the root of the vault.
- If your Meridian environment has many groups and users and selecting them in the task below is tedious, a web server setting can be configured that will show an alternative **Assign Roles** dialog. This dialog allows you to filter the list before selecting the users or groups to assign to a role. The setting to enable this feature is **AddRoleAssignmentsInDialog** and it must be set to **1** in the PowerWeb profile file of the user that will use the dialog. The setting applies only to PowerWeb. For information about editing the profile file, see the *Configure Default PowerWeb User Settings* article in the *Meridian Enterprise Administrator's Guide*.


PowerWeb Procedures

Use these steps for [PowerWeb](#).

Assign Roles to Folder

To assign roles to a folder:

1. In the **Folders** navigation view, select the folder to which you want to assign roles.
2. Choose between two options:
 - In the view bar, click **Role Assignments**.
 - In the **Folder** ribbon, in the **Information** group, click **Role Assignments**.

The list of current role assignments appears.
3. To disable role assignment inheritance and explicitly assign roles to the folder, disable **Inherit from parent folder**.
The **Add to List** button becomes enabled.
4. Above the **Apply** button, select the name of the user or group from the left list to which you want to assign a role.
5. Select the role from the right list that you want to assign to the selected user or group and then click **Add to List** .

The new role assignment is added to the list of current role assignments.

6. Click **Apply**.

Remove Roles from Folder

To remove roles from a folder:

1. In the **Folders** navigation view, select the folder from which you want to remove roles.
2. Choose between two options:
 - In the view bar, click **Role Assignments**.
 - In the **Folder** ribbon, in the **Information** group, click **Role Assignments**.

The list of current role assignments appears.
3. In the roles list, place a check mark in the leftmost column of the role that you want to remove and then click **Remove**.
4. If you accidentally remove a role that you want to keep, click **Undo Remove**.
5. Click **Apply**.

Export Security Assignments from Folder and Sub-Folders

Security assignments are saved in XML format. You can open the file in a web browser to view or print the information. The file contains a reference to an example XSLT file named `security_report.xslt` that, if copied to the same folder with the output, will transform and format the output using the styles that are defined in the XSLT file.

By default, the security assignments file is installed in the Meridian Enterprise folder at `C:\Program Files (x86)\BC-Meridian\Program`. You can modify the XSLT file to meet your own requirements. We recommend that you not modify the XML output file.

To export the security assignments of the current folder and its sub-folders:

1. In the **Folders** view, select the top-level folder from which you want to export roles.
2. Choose between two options:
 - In the view bar, click **Role Assignments**.
 - In the **Folder** ribbon, in the **Information** group, click **Role Assignments**.The list of current role assignments appears.

3. Click **Export**.

The file `<FolderName>.xml` downloads to your browser where you can save it.

Remove Existing Security Assignments

Note:

If the vault has many roles assignments, this operation can take a long time (hours). We recommend that you perform this operation after production hours.

To remove all existing security assignments:

1. In the **Folders** view, select the top-level folder from which you want to remove all role assignments.
2. Choose between two options:
 - In the view bar, click **Role Assignments**.
 - In the **Folder** ribbon, in the **Information** group, click **Role Assignments**.The list of current role assignments appears.
3. To disable role assignment inheritance and explicitly assign roles to the folder, disable **Inherit from parent folder**.
The **Clear** button becomes enabled.

4. Click **Clear**.
A dialog box opens, asking you to confirm your choice.
5. Click **Yes**.
The role assignments are removed.

Import Role Assignments from XML

Note:

- If the XML file contains references to folders that do not yet exist in the current vault, the folders will be skipped and not created automatically.
- The role assignments that are imported will replace all existing role assignments for each folder, not add to them. Be sure that no critical role assignments will be lost if you proceed.
- If the vault from which the XML file was created has many roles assignments, this operation can take a long time (hours). We recommend that you perform this operation after production hours.

To import role assignments from an XML file that was previously exported:

1. In the **Folders** view, select the top-level folder to which you want to import roles.
2. Choose between two options:
 - In the view bar, click **Role Assignments**.
 - In the **Folder** ribbon, in the **Information** group, click **Role Assignments**.
The list of current role assignments appears.
3. To disable role assignment inheritance and explicitly assign roles to the folder, disable **Inherit from parent folder**.
The **Import** button becomes enabled.
4. Click **Import**.
The **Choose File to Upload** dialog box appears.
5. Select the file that contains the role assignments that you want to import and then click **Open**.
A dialog box opens, asking you to confirm your choice.
6. Click **Yes**.
The role assignments are imported.

PowerUser Procedures

Use these steps for [PowerUser](#).

Assign Roles to Folder

To assign roles to a folder:

1. In the **Folders** view, select the folder to which you want to assign roles.
2. Select **Assign Roles** from the **Folder** menu.
The **Assign Roles** dialog box appears.
3. To disable role assignment inheritance and explicitly assign roles to the folder, disable **Inherit from parent folder**.
The **Add** button becomes enabled.
4. Click **Add**.
The **Add User Role Assignment** dialog box appears.
5. Select a role from **Add to role**.
6. To assign a group to the selected role, enable **Group** and type or select a group name from the adjacent list.
7. To assign a user to the selected role, enable **User** and type or select a user name from the adjacent list.
8. Click **Check Name** to validate the selected name.
9. Click **OK**.
The role assignment is added to the list.
10. Repeat steps 4 through 8 to assign more roles to the folder.
11. Select a role assignment and click **Remove** to remove the role assignment.
12. Click **OK**.
The current role assignments are applied to the current folder.

Export Security Assignments from Folder and Sub-Folders

Security assignments are saved in XML format. You can open the file in a web browser to view or print the information. The file contains a reference to an example XSLT file named `security report.xslt` that, if copied to the same folder with the output, will transform and format the output using the styles that are defined in the XSLT file.

By default, the security assignments file is installed in the Meridian Enterprise folder at `C:\Program Files\BC-Meridian\Program`. You can modify the XSLT file to meet your own requirements. We recommend that you not modify the XML output file.

To export the security assignments of the current folder and its sub-folders:

1. In the **Folders** view, select the top-level folder from which you want to export roles.
2. Select **Assign Roles** from the **Folder** menu.
The **Assign Roles** dialog box appears.
3. Click **Export**.
The **Save As** dialog box appears.
4. Specify a location and filename for the file and click **Save**.
The role assignments are exported.

Remove Existing Security Assignments

Note:

If the vault has many roles assignments, this operation can take a long time (hours). We recommend that you perform this operation after production hours.

To remove all existing security assignments:

1. In the **Folders** view, select the top-level folder from which you want to remove all role assignments.
2. Select **Assign Roles** from the **Folder** menu.
The **Assign Roles** dialog box appears.
3. Click **Clear**.
A dialog box opens, asking you to confirm your choice.
4. Click **Yes**.
The role assignments are removed.

Import Role Assignments from XML

Note:

- If the XML file contains references to folders that do not yet exist in the current vault, the folders will be skipped and not created automatically.

- The role assignments that are imported will replace all existing role assignments for each folder, not add to them. Be sure that no critical role assignments will be lost if you proceed.
- If the vault from which the XML file was created has many roles assignments, this operation can take a long time (hours). We recommend that you perform this operation after production hours.


To import role assignments from an XML file that was previously exported:

1. In the **Folders** view, select the top-level folder to which you want to import roles.
2. Select **Assign Roles** from the **Folder** menu.
The **Assign Roles** dialog box appears.
3. Click **Import**.
The **Open** dialog box appears.
4. Select the file that contains the role assignments that you want to import and then click **Open**.
A dialog box opens, asking you to confirm your choice.
5. Click **Yes**.
The role assignments are imported.

View Document Thumbnails in Folder

As of the 2022 release, you can preview the contents of a folder without having to navigate into the folder. If you do not have permission to view the document, you cannot see the document's thumbnail.

To preview document contents:

1. In the **Folders** navigation view, select the folder you want to preview.
2. In the view bar, click the **Thumbnails** button .

The **Thumbnails** button is only available if you have the appropriate permissions to see the contents of the folder.

A preview pane appears. This preview pane contains thumbnails for documents and folders contained in the folder.

3. Choose between two options:
 - To open a document, click the thumbnail for the document.
 - To perform an action on the document:
 - a. Right-click the thumbnail for the document.
The context menu appears.
 - b. Select the appropriate action from the context menu.

Delete and Undelete Documents and Folders

Deleting a document or folder removes it from view. However, it does not remove it permanently from the vault. The item can be restored to its original location, similar to restoring files from the Windows Recycle Bin. The difference is that Meridian does not store all deleted documents in one location but rather tracks deleted documents according to their parent folder.

Notes About Functionality

- Folders are deleted recursively by both PowerUser and PowerWeb, similar to Windows. This means that deleting a folder that contains sub-folders will also delete the sub-folders and the documents they contain. The confirmation dialog box shows how many child items would be deleted if the user proceeds.
- Folders and their contents are undeleted recursively by PowerUser but not undeleted recursively by PowerWeb. Undeleting a folder in PowerWeb only restores the folder, not its contents. You must undelete the child folders and documents individually.
- Deleted documents that have never been released in the vault cannot be undeleted. In other words, new documents cannot be undeleted until after they have been released at least once.
- References to deleted documents are not restored by **Undelete**.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Delete a Document or Folder

To delete a document or folder:

1. Choose one of the following options:
 - Right-click the document or folder that you want to delete, point to **Edit** and then click **Delete**.

A dialog box opens, asking you to confirm your choice.

- From the ribbon:
 - a. Select the document or folder that you want to delete.
 - b. In the **Edit** ribbon, in the **Organize** group, click **Delete**.
A dialog box opens, asking you to confirm your choice.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Select **Edit > Delete**.
A dialog box opens, asking you to confirm your choice.
2. Click **OK**.
- The document or folder is deleted.

Undelete a Document or Folder

To undelete a document or folder:

1. Choose one of the following options:
 - Right-click the folder from where the document was deleted, then select **Edit > Organize > Undelete**.
The **Deleted folders and documents** dialog box appears.
 - From the ribbon:
 - a. Select the folder from where the document was deleted.
 - b. In the **Edit** ribbon, in the **Organize** group, click **Undelete**.
The **Deleted folders and documents** dialog box appears.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Select **Edit > Organize > Undelete**.
2. Select the items that you want to undelete.
3. Click **Undelete**.
The items are restored.

PowerUser Procedures

Use these steps for [PowerUser](#).

Delete a Document or Folder

To delete a document or folder:

1. Select the document or folder you want to delete.
2. Choose one of the following options:
 - On the **Edit** menu, select **Delete**.
 - Right-click the item and select **Delete** on the shortcut menu.
 - Press Ctrl+D.
 - Press Delete.

You are prompted to confirm that you want to delete the item. If the item is a document and it has incoming references, you are prompted to confirm that you want to delete the document.

3. Click **Yes**.

Undelete a Document or Folder

To undelete a document or folder:

1. Select the parent folder of the item that was deleted.
2. On the **Document** or **Folder** menu, select **Undelete**.

The **Deleted Folders and Documents** dialog box appears, listing items that have been deleted from the selected folder but have not yet been purged from the vault.

3. Select the item you want to restore and click **Undelete**.
4. Click **Close**.

The item is restored to its original location.

Project Folders

Meridian Enterprise includes a set of features named *Managed Change* that is a subset of the project management features of the Meridian Advanced Project Workflow Module. Manage Change (and the Meridian Advanced Project Workflow Module to a greater degree) allows you to create *project folders* in the Main area of a vault to contain in-progress documents. Those documents are called *project copies* and are made from *master documents* that reside elsewhere in the vault. Master documents can be considered as-built documents.

The Managed Change features are recommended for those organizations that work with many projects.

The differences between Managed Change and the Advanced Project Workflow Module are compared in the following table.

Project folder differences

Managed Change	Advanced Project Workflow Module
Project folders do not include workflow.	Project workflows are fully configurable.
Project folders may not contain subprojects.	Project folders may contain subproject folders.
Project folders do not have workflows and therefore may not be interlocked.	Project workflows may be interlocked with other project workflows and document workflows.
Documents may be copied to only one project folder at a time.	Documents may be copied to multiple project folders for concurrent changes.

In all other respects, the project document management features of Managed Change are the same as in the Advanced Project Workflow Module.

The following topics describe the common tasks that can be performed with the Managed Change commands.

Waiting Lists

If your organization uses concurrent engineering, they can configure the waiting list process for a document type. This allows multiple engineers to create project copies of a document and edit the document when it's their turn in the queue. When a waiting list is in use, the project copy is locked.

The priority column indicates where the position of the waiting project copy in the waiting list. Priority 0 indicates that the project copy is the one currently being edited. Priorities greater than 0 are waiting to be edited.

When a document is a project copy in a waiting list and is not at the top of that list with priority 0, these actions are unavailable:

- modify content
- modify rendition
- annotate rendition
- change workflow state
- create a sub project copy
- modify references
- associated commands

Depending on your privileges, you can [manage the waiting list](#) for a document on the [Master and Project Copies](#) page.

Manage a Waiting List

You can manage a waiting list on the [Master and Project Copies page](#) of the selected document including:

- Change the priority of a waiting project copy
- Discard a waiting project copy
- Transfer to next – make the next in the waiting list the active project copy when the active project copy was released to master and there is now no active project copy.

Change the Priority

If your user is assigned the **Change Waiting List** privilege, you can change the priority of a waiting project copy.

To change the priority of a waiting project copy:

1. Scroll to the bottom of the **Master and Project Copies** page of the document you want to change.
2. Click **Change Priorities**.
The **Priority** column becomes editable.
3. Select the waiting project copy that you want to change.
The **Set priority** dialog box opens.
4. Optionally, enter a comment to be recorded in the **Document Log**.
5. Select the priority you want using one of these methods:
 - Use the up or down arrow buttons to increase or decrease the priority.
 - Select a priority number button.
 - Click **Other**, enter the number, then click **Apply**.The **Waiting PC Priority** column shows your selection.
6. Repeat the last three steps for each waiting project copy that you want to change.
7. Click **Apply**.

Discard a Waiting Project Copy

You can discard waiting project copy from the Project tab. When you do so, the priorities of the other waiting project copies in the list are adjusted. If you discard the active project copy, the priorities of the documents in the waiting list are unchanged.

To discard a waiting project copy:

1. Select the waiting project copy that you want to discard.
2. Choose between two options:
 - Select the **Project** then click **Discard from Project**.
 - Right-click the document in the waiting list then select **Project > Discard from Project**.

The **Discard from Project** dialog box opens.

3. Click **OK**.

If the document is not the active project copy, it is discarded and the priorities on the waiting list are updated to reflect the fact the project copy is discarded.

If the document is the active project copy, a warning dialog box opens.

4. Click **Yes**.

The active project copy is discarded, but the waiting list priorities remain unchanged. In this scenario, the next document is not made the active project copy as that must be manually selected using the **Transfer to Next** option.

Transfer to Next

Depending on the way in which your vault and project folders are configured, when you release the active project copy as master, the next waiting project copy remains as a waiting project copy.

Your vault can be configured so that when a user releases the active project copy as master, the next waiting project copy becomes the active project copy in the waiting list with the priority zero. However, this not the default behavior.

You can use the transfer to next option to make that project copy the active project copy and set its priority to zero.

To transfer to the next project copy:

1. Select the master document.
2. Choose between two options:
 - Right-click the document and then select **Project > Transfer to Next** in the context menu that appears.
 - In the Project ribbon, click **Transfer to Next**.

The waiting project copy that is first in the waiting list becomes the active project copy and its Priority is set to zero. The priority of the other waiting project copies is adjusted to match.

Project Definitions

All of the functionality of project folders revolves around project definitions. Project definitions are the elementary building blocks upon which project folders are created to contain project copies of master documents for revision. Project definitions are the templates from which project folders can be made in a vault. Project definitions are created by a System Administrator with the Meridian Enterprise Configurator tool.

Project definitions determine the following characteristics of a project folder:

- The associated custom folder type that can have custom properties and can limit where project folders may be created within the vault's folder structure.
- Project workflow states and transitions that model the project life cycle.
- Sub-project folders that may be created within the project folder to represent subordinate engineering processes.
- Workflow interlocks (rules) on the documents within a project folder that must be met before the project's workflow can change.
- Workflow interlocks (rules) on the parent project, peer projects, or sub-projects that must be met before the project's workflow can change.

Although project definitions can be complex, using project definitions is relatively straightforward. Any project definitions available in a vault are listed on menus alongside available folder types and document types for easy selection. Consult a System Administrator for information regarding the project definitions available in your vault(s).

For information on creating project definitions, see *Create a Project Definition* in the *Meridian Enterprise Configuration Guide*.

Create a New Project Folder

Depending on your vault configuration, you may have one or more project types (templates) from which to choose.


Copying a project folder to another location in the vault (via drag and drop or the Clipboard) will create a normal folder containing only the documents that were originally created in the project folder, not any project copies. Project copies residing in the source project folder are not copied to the new folder because copying documents with active workflows would violate workflow integrity.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To create a new project folder:

1. Right-click the parent folder where you want the project folder to be located, point to **New Project**, and then click the name of a project template.

Available project types are indicated by the project type icon . Consult your System Administrator for the names of project types that have been configured in your vault. Depending on the project template selected, wizard pages may appear for input of project information.

2. Complete any wizard pages that appear and click **Finish**.

The project folder is created within the selected parent folder.


PowerUser Procedures

Use these steps for [PowerUser](#).

To create a new project folder:

- Choose between two options:
 - To create a folder by right-clicking the parent folder:

1. Right-click the parent folder where you want the project folder to be located, point to **New**, and then click the name of a project template.

Available project definitions are indicated by the project definition icon . Consult your System Administrator for the names of project definitions that have been configured in your vault.

Depending on the project template selected, wizard pages may appear for input of project information.

2. Complete any wizard pages that appear and click **Finish**.

The project folder is created within the selected parent folder.

- To create a folder using the **Vault** menu:

1. Select the parent folder where you want the project folder to be located.
2. On the **Vault** menu, point to **New**, and then click the name of a project template.

Depending on the project template selected, wizard pages may appear for input of project information.

3. Complete any wizard pages that appear and click **Finish**.

The project folder is created within the selected parent folder.

Project Folder Properties

The **Folder** property page of a project folder will display two groups of properties.

- The properties in the **Folder Details** group are the same properties as those displayed for normal (non-project) folders.
- The properties in the **Project Details** group are similar to those displayed for document workflow except that the **Type** property displays the project type from which the project folder was created and no **To Do** property is shown.

Sub-Projects

Sub-projects are simply normal project folders that can be created within another existing project. Sub-projects allow a very large project to be broken down into more manageable pieces. For example, a large commercial construction project could be managed in one project folder containing numerous sub-project folders for managing individual trade projects.

Sub-projects can also contain other sub-projects any number of levels deep. Project workflow interlocks can help synchronize sub-project workflows with their parent project workflow.

Depending on your vault's configuration, not all project definitions may be able to be created as sub-projects. Consult a System Administrator for more information on the project definitions that be used to create sub-projects in your vault.

Reassign Project Managers

Reassigning project managers changes the persons who are authorized to run a project's workflow transitions. This can be useful if a current manager is unavailable to continue the project's workflow or to assign additional managers.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To reassign project managers:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project folder for which you want to reassign its managers.
 2. In the **Folder** ribbon, in the **Workflow** group, click **Reassign Project Managers**.
The **Project Workflow - Reassign Project Manager** dialog appears.
 3. Select the desired managers.
 4. Optionally, type a comment to be added to the project workflow log.
 5. Click **OK**.
 - From the context menu:
 1. Right-click the project folder for which you want to reassign its managers.
 2. Point to **Workflow** and then click **Reassign Project Managers**.
The **Project Workflow - Reassign Project Manager** dialog appears.
 3. Select the desired managers.
 4. Optionally, type a comment to be added to the project workflow log.
 5. Click **OK**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To reassign project managers:

1. Select the project for which you want to reassign managers.
2. From the **Folder** menu, select **Project Workflow**, and click **Reassign Project Manager(s)**.
The **Reassign Project Manager(s)** dialog appears.
3. Select the desired managers.
4. Optionally, type a comment to be added to the project workflow log.
5. Click **OK**.

The names of the new managers will appear in the **Manager** property on the **Folder** property page.

Run a Workflow Transition on a Project

Every project folder in a vault has a workflow configured by a System Administrator. A project's workflow determines the states through which the project must proceed from start to finish. It also determines the transitions that users can run to route the project from one state to the next in that workflow.

PowerWeb Instructions

Use these steps for [PowerWeb](#).

Run a Workflow Transition

If the transition is valid, it will be run and the project's **Status** property will change to indicate the new workflow state.

Running a transition might also cause wizard pages to appear or property values to be automatically assigned. If wizard pages appear when you run a transition, type as much information as you know or as required and complete the wizard just as you would a wizard that is shown when creating a new document. After the transition has been run, properties of the project folder may have been automatically assigned by the transition. Consult a System Administrator for more information on transition wizard pages and property assignments configured for your vault.

To run a workflow transition:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project to route.
 2. On the **Workflow** ribbon, select a workflow transition or click **Reroute Projects**.
 - From the context menu:
 1. Right-click the project folder.
 2. Point to **Workflow** and select a workflow transition.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project folder.
 2. Point to **Workflow** and select a workflow transition.

Run a Workflow Transition for a Batch of Files

To run a workflow transition for a batch of files:

1. [Conduct a search.](#)

2. Select the **Search Results** heading.

This will apply the command you select to all results in your search, including results on subsequent pages.

3. Select a workflow transition from the **Workflow** tab.

The transitions that are available are those that are available for the first document in the search results.

If the command is applicable for all files in the search results, the operation succeeds. Otherwise, the system executes the command for the files where the command is applicable.

If the transition is valid, it will be run and the project's **Status** property will change to indicate the new workflow state.

Running a transition might also cause wizard pages to appear or property values to be automatically assigned. If wizard pages appear when you run a transition, type as much information as you know or as required and complete the wizard just as you would a wizard that is shown when creating a new document. After the transition has been run, properties of the project folder may have been automatically assigned by the transition. Consult a System Administrator for more information on transition wizard pages and property assignments configured for your vault.

PowerUser Instructions

Use these steps for [PowerUser](#).

To run a workflow transition:

1. Select the project to route.
2. From the **Folder** menu, choose **Project Workflow**, and click the name of the transition you want to run.

The name of the transition is configured by a System Administrator in the project's definition. The **Project Workflow** dialog box appears.

3. If managers have been configured for the project definition, select the appropriate names from the list.
4. Optionally, type a comment to be added to the project log and click **OK**.

If the transition is valid, it will be run and the project's **Status** property will change to indicate the new workflow state.

Running a transition might also cause wizard pages to appear or property values to be automatically assigned. If wizard pages appear when you run a transition, type as much information as you know or as required and complete the wizard just as you would a wizard that is shown when creating a new document. After the transition has been run, properties of the project folder may have been automatically assigned by the transition. Consult a System Administrator for more information on transition wizard pages and property assignments configured for your vault.

Depending on the configuration of the project, conditions or interlocks might prevent a transition from being run. Running a transition on a batch of documents may cause some of the documents to advance to a different state than expected due to transition equivalence.

Transition Conditions And Interlocks

A project definition may have conditions or interlocks configured that control when its transitions may be run.

- *Conditions* are rules based on the values of certain folder properties of the project itself or on programming expressions that a System Administrator may have defined.
- *Interlocks* are rules based on the values of certain properties of project folders or of documents. Project interlocks apply to the current project or its subprojects; that is, downstream from the project folder. Document interlocks can apply to all, any, or no documents contained with a project folder. Document interlocks can affect the project itself, its parent project, or the topmost project of a project hierarchy; that is, upstream from the project folder.

Transition conditions and interlocks can be simple or very complex. Consult a System Administrator for more information on the transition conditions and interlocks configured in your vault.

Transition Equivalence

Transition equivalence is the equality of a transition in one document workflow to a different transition in a different document workflow. This makes it possible to run a transition for one document in a batch of documents and have it run transitions in other documents within the batch even if the transitions don't have the same name.

For example, consider a batch of three documents. The next and final transition of the first document is named Release and completes the workflow. The final transition of the other two documents is named Issue, but the Issue transition is not the next transition in their workflows. Also assume that a System Administrator has defined the first document's Release transition to be equivalent to the other documents' Issue transition. After the first document's Release transition has been run, the other two documents' Issue transitions will run as well, completing the workflows of all three documents in one step.

A System Administrator can define transition equivalence between:

- All transitions to the same destination state
- All transitions with the same tag name
- All transitions from the same source state
- No other transition

Transition equivalence can cause seemingly inexplicable changes in a document's workflow. Consult a System Administrator for more information on the transition equivalence configured for workflow definitions in your vault.

Create a Project Copy

You can create a project copy from a master document. This copies an existing master document to a project folder, optionally locks the master document, and links the project copy to the master document.

This is similar to creating a new document as a derivative of an existing document. The copy can be further developed during the project and released as a new revision of the master document. For example, a master facility drawing may need to be modified as part of a facility upgrade or expansion. Yet, facility managers need access to the master drawing until the project is complete. You can do so by creating a project copy of the current master drawing.

You can also lock the master drawing against other revisions. The project copy may then be modified as necessary without affecting the master drawing.

If the Advanced Project Workflow Module has been enabled for the vault, multiple project copies can be made from the same master document to allow for concurrent engineering with the ability to track each project copy. If your organization uses the [Waiting Lists](#) and a project copy already exists, when you create a project copy a waiting project copy is created instead. If the project copy is a waiting project copy, it cannot be edited until the priority reaches zero or the priority is changed. Waiting project copies are created in the workflow state Unchanged. If you have the privileges to do so, you can [manage a waiting list](#).

If the concurrent engineering rule is set to serial change on the selected project copy, you cannot create a project copy or a for info copy.

Note:

To use this command in PowerWeb, you need the normal Managed Change privileges plus **Start Quick Change**.

In Meridian 2021 PowerWeb, when the action to create a waiting project copy or a for info copy runs, the **Initialize New Document** command runs twice. This issue was resolved in 2021 R2.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To copy a document to an existing project:

1. Choose one of the following options:
 - From the ribbon:
 - a. In any navigation view, select the master document you want to copy.
 - b. In the **Project** ribbon, in the **Assign** group, click the down arrow next to **Create Project Copy**.
 - c. Select one of the following options:
 - **Create Project Copy**
 - **Create Project Copy and Lock**
 - **Create Project Copy with References**
 - From the context menu:
 - a. Right-click the master document you want to copy.
 - b. Point to **Project** and then select one of the following options:
 - **Create Project Copy**
 - **Create Project Copy and Lock**
 - **Create Project Copy with References**
 - **Create Project Copy for Information** — creates a copy in the project folder you select. The copy is not shown on the **Master and Project Copies** page. In addition, you cannot:
 - change the content natively, on renditions, or annotate it
 - change the properties
 - start a workflow
 - release to master
 - transfer to another project
 - transfer to next waiting project copy.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Point to **Project** and then select one of the following options:
 - **Create Project Copy**
 - **Create Project Copy and Lock**
 - **Create Project Copy with References**
 - **Create Project Copy for Information** — creates a copy in the project folder you select. The copy is not shown on the **Master and Project Copies** page. In addition, you cannot:
 - change the content natively, on renditions, or annotate it
 - change the properties
 - start a workflow
 - release to master
 - transfer to another project
 - transfer to next waiting project copy.

The **Select Project** dialog box appears. If the list of project folders is very long, you can filter the list by typing part of the desired folder path in the text box.

As of the 2022 release, you can create a new folder or project from the **Select Project** dialog. This functionality does not work in ActiveX mode.

To create a new folder or project:

- a. Click **New Folder**.

The **Create Folder / Select Folder Type** dialog opens.

- b. Choose between three options:
 - If you want to create a regular folder:
 - i. Select the **Regular Folder** option.
 - ii. Click **Next**.
 - iii. Type the new folder name and click **OK**.
The new folder is created.

- If you want to create a folder with a specific folder type:
 - i. Select the **Folder of Type** option.
 - ii. Select the type of folder you want to create from the menu.

You must have the **Create folder of this type** privilege to create folders using custom types as described in the *Security Privilege Descriptions* article in the *Meridian Enterprise Configuration Guide*.
 - iii. Click **Next**.
 - iv. Type the new folder name and click **OK**.

The new folder is created.
- If you want to create a new project:
 - i. Select the **Project of Type** option.
 - ii. Select the type of project you want to create from the menu.
 - iii. Click **Next**.
 - iv. Complete any wizard pages that appear and click **Finish**.

The project folder is created within the selected parent folder.

For more information about creating project folders, see [Create a New Project Folder](#).

Note:

- The root folder that is shown in this dialog box can be controlled by vault customization. This can be done to limit project copies to be made only in certain project folders depending on your organization's business processes. The folder that you last selected in this dialog box may or may not be selected by default depending on that customization.
 - The vault might be configured to automatically create sub-folders below the folder that you select and the project copy might be created there.
2. Select the folder where you want to copy the document and click **Next**.

If the document type is configured to use [waiting lists](#) and there is already an active project copy, a dialog box opens indicating that a project copy cannot be created, but you can create a waiting project copy instead. This also applies if you selected several documents in a batch.

If concurrent engineering is not allowed for the document type, you can opt to create a read-only project copy for information purposes.

If the master document has references, the assembly copy page appears. It lists the master document and its reference documents of the **TagObjectReference** and manual reference types. Documents that will be copied are indicated with a green checkmark icon ✓ (the

default is none). Documents that will not be copied are indicated with a magenta equals sign icon = (the default is all).

By default, the project copy will reference the original reference documents and copies will not be made of them. Alternatively, you can copy the reference documents together with the master document and the master document will reference the project copies of the reference documents (and copies of them made in the same project).

3. To copy specific reference documents to the project folder and reference them, click the = icon to change it to ✓.

If you select any part of the assembly without first selecting the parent assembly, the parent will be selected automatically.

Note:

- Some parts might not be selectable for copying due to the configuration of the reference type that links them to the parent assembly.
- Additional documents that are invisible in this dialog might also be copied, parts of sub-assemblies, for example.

4. Click **Start Copy** to begin copying.

The **Create project copy for <assembly>** dialog box appears and shows the results of copying each file.

The master document is copied to the destination project in the **Unchanged** state.

5. Click **Close**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To copy a document to an existing project:

1. Select the master document to be copied to a project folder.
2. From the **Document** menu, point to **Managed Change (Master/Project Copy)** and then click **Assign to Folder (Create Project Copy or Create Project Copy and Lock)**.

The **Select folder** dialog box appears.

Note:

- The root folder that is shown in this dialog box can be controlled by vault customization. This can be done to limit project copies to be made only in certain project folders depending on your organization's business processes. The folder that you last selected in this dialog box may or may not be selected by default depending on that customization.

- The vault might be configured to automatically create subfolders below the folder that you select and the project copy might be created there.
3. Select an existing project folder to copy the document to and click **OK**.

Click **New Folder** to manually create a new folder, if necessary.

Note:

If the master document was last released from the same folder, a warning message will appear and the document cannot be reassigned to the same folder.

If the master document has references, the Meridian Enterprise Reference Explorer appears similar to the following figure. It lists the master document and its reference documents.

Documents that will be copied are indicated with a green checkmark icon ✓. Documents that will not be copied are indicated with a magenta equals sign icon =.

By default, the project copy will reference the original reference documents and copies will not be made of them. Alternatively, you can copy the reference documents together with the master document and the master document will reference the project copies of the reference documents (and copies of them made in the same project). If you do not have the **Create Project Copy From** privilege for reference documents in sub-folders, the references are not made. This behavior is different than in PowerWeb.

- a. Choose between two options:

- To also copy specific reference documents to the project folder and reference them, right-click the document name that you want to copy and click **Select for Copy**.
- To copy the selected document and all of its child reference documents and reference them, click **Select Entire Branch for Copy**.

- b. Click **OK** to begin copying.

For more information about using the reference browser dialog, see [Showing project copies](#).

Depending on the document type of the document being added to the project folder, wizard pages may appear for input of document information.

4. Complete any wizard pages that appear and click **Finish**.

The master document is copied to the destination project in the **Unchanged** state.

Note:

- The **Created By** and **Created At** properties of the project copy are who and when the copy was created, respectively. The **Modified By** and **Modified At** properties of the project copy are the same values as for the master document.
- Depending on the configuration of the vault, subfolders might be created automatically in which to store the project copy.

If you selected the **Create Project Copy and Lock** command, in addition to creating the project copy, the master document is locked by the project copy. If the master document is already locked by a previous project copy, it will remain locked by that copy.

Copy a Project Copy To Another Project Folder

Copying a project copy from one project to another creates a new project copy in the destination project from the content of the source project copy. However, the reference created to the new project copy may not be what you would expect. Unlike **Create Project Copy**, which creates a reference between the master document (source) and the project copy, **Transfer to Project** creates a reference between the master document (not the source) and the project copy even though the source of the new project copy is another project copy in this case. The reason for this is so that the new project copy can ultimately be released as a new revision of the master document, not a new revision of the project copy from which it was made. This distinction is important to enable as-built projects. **Transfer to Project** can be used to create project copies for other purposes so long as the reference to the master document is taken into consideration and the intention is not to release the project copy to become a new revision of its source project copy.

Transfer to Project can be useful when the organization's process for resolving concurrent engineering projects is to use an as-built project. For example, assume multiple project copies have been made from a master document into different project folders and each project copy has undergone different changes. Assume a new project folder is created in which all of the changes should be merged together into a new document that should be released as the new master document revision. Rather than start with a fresh copy of the master document, which contains none of the changes made in the project copies, **Transfer to Project** can be used to create a copy in the new as-built project from one of the project copies instead, presumably, the one with the most changes. Changes in the other project copies can then be merged manually into it until the as-built project copy contains all of the changes and can then be released as the new master document revision.

This task is only available if the Advanced Project Workflow Module has been enabled for the vault.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Note:

Copying documents that have no master document and folders is not supported.

To copy a project copy from one project to another:

1. Choose one of the following options:

- From the ribbon:
 - a. Select the project copy that you want to be the source of the copy.
 - b. In the **Project** ribbon, in the **Assign** group, click **Transfer to Project**.
The **Select Project** dialog box appears.

- From the context menu:
 - a. Right-click the document you want to be the source of the copy.
 - b. Point to **Project** and select **Transfer to Project**.
The **Select Project** dialog box appears.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Point to **Project** and select **Transfer to Project**.
The **Select Project** dialog box appears.

2. Select an existing project folder to copy the document to and click **Next**.

Depending on the document type of the document being added to the project, wizard pages may appear for input of document information.

3. Complete any wizard pages that appear and click **Finish**.

The **Transfer to Project** dialog box shows the progress and results of the command as the project copy is copied to the destination project and placed under change for you.

PowerUser Procedures

Use these steps for [PowerUser](#).

To copy a project copy from one project to another:

1. Select the project copy that you want to be the source of the copy.
2. From the **Document** menu, select **Master/Project Copy**, and click **Transfer to Project**.
The **Select folder** dialog box appears.

3. Select an existing project folder to copy the document to and click **OK**.

Click **New Folder** to create a new normal folder, if necessary.

Depending on the document type of the document being added to the project, wizard pages may appear for input of document information.

4. Complete any wizard pages that appear and click **Finish**.

The project copy is copied to the destination project and placed under change for you.

This completes copying a project copy to a project. You can now edit the document or manage it as described in any of the following topics.

Release a Project Copy as a New Master Document

Releasing a project copy as a new master document causes a new revision of the master document to be created from the content of the project copy that is being released. The project copy remains in the project for future reference, though inactive.

Notes About Behavior

- After project a copy is released, another project copy can be created from same master document in same project. You can create a workaround for this using VBScript. For more information about VBScript, see the *Meridian Enterprise VBScript API Reference Guide*.
- Master document hybrid parts will not be replaced by renamed project copy hybrid parts unless the content of the project copies has also been changed.
- If this command is run on a selection of documents, only the documents that meet the preceding conditions will be released. The other documents will not be released until the conditions have been met and the command run on them again.

General Requirements

In order to release a project copy as a new master document, the following conditions must be met:

- The project copy must be in a released document workflow state.
- The master document must not be locked or it must be locked by the project copy being released. If the project copy cannot be released as a new master document revision because the master document is locked by a different project copy, you must unlock it first. See [Unlock a Master Document](#).
- The master document must not have been changed since the project copy was created. If the project copy cannot be released as a new master document revision because the master document has been changed, you must reconcile the project copy with the master document first. See [Reconcile With an Updated Master Document](#).

Security Requirements

- You must have the following privileges to use this command if the master document already exists:
 - Document privileges: **Edit in Application, View Content, Release as Master Revision, Lock Master Document, Update Master Document, Unlock from Project**
 - Folder privileges: **List Content**
 - Workflow privileges: **Start Quick Change, Release Quick Change**
- If the master document does not already exist you must have the following privileges in addition to the preceding privileges:
 - Folder privileges: **Create Document**

For more information about privileges, see [Security privilege descriptions](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Important!

When any dependency of the selected document cannot be released as master, this action will fail.

If the following conditions are true and you cancel the operation, the document will be released unexpectedly. If these conditions are not true, the document will remain its current state.

- Site cache mode option is enabled as described in [Personal Preferences](#)
- The document uses a custom workflow
- A custom property page is shown during the transition

To release a project copy to master:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project copy.
 2. In the **Project** ribbon **Assign** group, select **Release as Master Revision**.
 - From the context menu:
 1. Right-click the project copy.
 2. Point to **Project** and select **Release as Master Revision**.

- From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy.
 2. Point to **Project** and select **Release as Master Revision**.

A new revision of the master document is created using the project copy.

If the document type is configured to use [waiting lists](#), the [Master and Project Copies page](#) no longer shows that project copy. Depending on the way in which your vault and project folders are configured, the next waiting project copy remains as a waiting project copy. If this occurs, you can [Transfer to next](#), which activates next waiting project copy and sets its priority to zero.

PowerUser Procedures

Use these steps for [PowerUser](#).

To release a project copy to master:

1. Select the project copy to be released.
2. From the **Document** menu, select **Managed Change (Master/Project Copy)** .
3. Click **Release from Folder (Release as Master Revision)**.

A new revision of the master document is created from the content of the project copy and the project copy becomes inactive.

Reconcile With an Updated Master Document

When the master document of a project copy has changed since the project copy was made, the master document may contain more or less information than the project copy, possibly making the project copy obsolete.

You can reconcile the difference between the two documents by one of the following commands:

- **Discard from Folder (Project)** — This assumes that because of whatever changes were made to the master document, the project copy is now obsolete and the project copy should be destroyed. This command cannot be undone.
- **Confirm Superseded by Master** — This assumes that because of whatever changes were made to the master document, the project copy is now obsolete. In this situation, the system retains the project copy and its reference to the master document for future reference, but makes the project copy obsolete. The system also prevents the project copy from being released as a new master document revision. This command can be undone with the **Undo Make Obsolete** command.

This command is only available if the Advanced Project Workflow Module has been enabled for the vault.

- **Confirm Merged with Master** — This assumes that the changes made to the master document have also been made to the project copy. This option should be used after you have physically merged changes in the master document with the project copy. In this situation, the system retains the project copy and its reference to the master document for future reference. The system will allow the project copy to be released as a new master document revision (possibly after additional changes are made to the project copy) after which the project copy becomes inactive. This command can be undone with the **Require Merge** command.

This command is only available if the Advanced Project Workflow Module has been enabled for the vault.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Reconcile a Project Copy

To reconcile a project copy of a changed master document:

- Choose between two options:
 - From the ribbon:
 1. Select the project copy you want to reconcile.
 2. Choose between two options:
 - In the **Document** ribbon, in the **Assign** group, click **Discard from Project**.
 - In the **Document** ribbon, in the **Merge** group, click **Confirm Superseded by Master** or **Confirm Merged with Master**.
 - From the context menu:
 1. Right-click the project copy you want to reconcile.
 2. Choose between two options:
 - Point to **Project**, and then click **Discard from Project**.
 - Point to **Project**, point to **Merge**, and then click **Confirm Superseded by Master** or **Confirm Merged with Master**.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy that you want to reconcile.
 2. Choose between two options:
 - Point to **Project**, and then click **Discard from Project**.
 - Point to **Project**, point to **Merge**, and then click **Confirm Superseded by Master** or **Confirm Merged with Master**.

Reverse Effects of Confirm Superseded by Master Command

To reverse the effects of the **Confirm Superseded by Master** command:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project copy that you want to reactivate.
 2. In the **Document** ribbon, in the **Merge** group, click **Undo Make Obsolete**.
This command is only available if the Advanced Project Workflow Module has been enabled for the vault.
 - From the context menu:
 1. Right-click the project copy that you want to reactivate.
 2. Point to **Project**, point to **Merge**, and then click **Undo Make Obsolete**.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy that you want to reactivate.
 2. Point to **Project**, point to **Merge**, and then click **Undo Make Obsolete**.

Reverse Effects of Confirm Merged with Master command

To reverse the effects of the **Confirm Merged with Master** command:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project copy that you want to re-merge.
 2. In the **Document** ribbon, in the **Merge** group, click **Require Merge**.
This command is only available if the Advanced Project Workflow Module has been enabled for the vault.
 - From the context menu:
 1. Right-click the project copy that you want to re-merge.
 2. Point to **Project**, point to **Merge**, and then click **Require Merge**.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy that you want to re-merge.
 2. Point to **Project**, point to **Merge**, and then click **Require Merge**.

PowerUser Procedures

Use these steps for [PowerUser](#).

Reconcile a Project Copy

To reconcile a project copy of a changed master document:

1. Select the project copy to be reconciled.
2. From the **Document** menu, point to **Managed Change (Master/Project Copy)** and click **Discard from Folder (Discard from Project, Confirm Superseded by Master, or Confirm Merged with Master)**.

Reverse Effects of Confirm Superseded by Master Command

This command is only available if the Advanced Project Workflow Module has been enabled for the vault.

To reverse the effects of the **Confirm Superseded by Master** command:

1. Select the project copy that you want to reactivate.
2. From the **Document** menu, click **Undo Make Obsolete**.

Reverse Effects of Confirm Merged with Master command

This command is only available if the Advanced Project Workflow Module has been enabled for the vault.

To reverse the effects of the **Confirm Merged with Master** command:

1. Select the project copy to be re-merged.
2. From the **Document** menu, click **Require Merge**.

Discard a Document From a Project Folder

Discarding a document from a project folder deletes the project copy. This is essentially the same as revoking a revision under change in a document workflow. The project copy is destroyed along with all changes made to it and cannot be restored. As such, you should only discard a project copy from a project folder when you are absolutely certain that it will not be needed.

Notes about Functionality

- Discarding a project copy from a project folder is similar to, but different than, deleting a project copy from the project folder. They both delete the project copy and unlock the master document. But deleting the project copy breaks its incoming references whereas discarding the project copy reroutes its incoming references to the master document and maintains the referential integrity of the related documents.

For this reason, you should always discard project copies, not delete them unless you know that no incoming references will be broken.

- By default, this action also removes any references to the discarded project copy. However, this behavior can be configured differently by a System Administrator. Depending on how it is configured, references between project copies might be redirected to the master document if a project copy is discarded from the project. If the remaining project copy is released from the project, both master documents will then be related by a reference that did not exist prior to the project copies being made.

In some scenarios, such as assembly relationships, this might be desirable. In other scenarios, such as custom references, this might not be desirable. Before using this command, carefully consider its effect on references with respect to your business processes and consult a System Administrator if the result is uncertain.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To discard a project copy document from a project folder:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project copy that you want to discard.
 2. In the **Project** ribbon, in the **Assign** group, click **Discard from Project**.
A dialog box opens, asking you to confirm your choice.
 3. Click **OK**.
 - From the context menu:
 1. Right-click the project copy that you want to discard.
 2. Point to **Project** and then click **Discard from Project**.
A dialog box opens, asking you to confirm your choice.
 3. Click **OK**.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy.
 2. Point to **Project** and then click **Discard from Project**.
A dialog box opens, asking you to confirm your choice.
 3. Click **OK**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To discard a project copy document from a project folder:

1. Select the project copy to be discarded.
2. From the **Document** menu, select **Managed Change (Master/Project Copy)** , and click **Discard from Folder (Discard from Project)**.
A dialog box opens, asking you to confirm your choice.
3. Click **Yes**.

Lock a Master Document

Locking a master document prevents it from being revised either directly by document workflow or indirectly by a project copy other than the one that is locking it. A locked master document may only be revised by the project copy from which the lock was placed.

A master document can be locked by either of two methods:

- With the **Create Project Copy and Lock** command while creating a project copy as described in [Create a Project Copy](#).
- With the **Lock Master Document** command if the project copy has already been created without a lock as described in the following task.

Note:

- Locking is recursive. This means that locking a master document will also lock any referenced documents. If locks on the references have been removed by other changes, you can refresh the locks by running this command again.
- This command is only available if the Advanced Project Workflow Module has been enabled for the vault.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To lock a master document to an existing project copy:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project copy.
 2. In the **Project** ribbon, in the **Locks** group, click **Lock Master Document**.
 - From the context menu:
 1. Right-click the project copy.
 2. Point to **Project**, point to **Locks**, and then click **Lock Master Document**.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy.
 2. Point to **Project**, point to **Locks**, and then click **Lock Master Document**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To lock a master document to an existing project copy:

1. Select the project copy for which you want to lock its master document.
2. From the **Document** menu, point to **Master/Project Copy**, and click **Lock Master Document**.

A red lock icon will appear next to the master document in the Navigation view to indicate that it has been locked in a project folder. Its **Locked** property will also be set to **Locked in project**. The master document may then not be revised until the project lock has been removed.

The lock may be removed by either releasing the project copy as a new revision of the master document or by manually unlocking it as described in [Unlock a Master Document](#).

Unlock a Master Document

Unlocking a master document removes the lock placed on it by a project copy. You might want to unlock a master document in order to start a document workflow on the master document or to create another project copy. However, the master document was probably locked for a good reason and you should first find out why it was locked before unlocking it.

A master document may be unlocked from either of two places:

- [The project copy from which the master document was locked](#)
- [The master document itself](#)

Note:

Unlocking is recursive. This means that unlocking a master document will also unlock any referenced documents.

Unlock a Master Document From the Project Copy

To unlock a master document from a project copy, you must first know from which project copy the master document was locked in order to select it. If you don't know the name of the project copy or the project folder where it is located, you can find out easily with the **Show Project Copies** command described in [Show Master And Project Copies](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To unlock a master document from the project copy:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project copy to which the master document is locked.
 2. In the **Project** ribbon, in the **Locks** group, click **Unlock Master Document**.
 - From the context menu:
 1. Right-click the project copy to which the master document is locked.
 2. Point to **Project**, point to **Locks**, then click **Unlock Master Document**.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy to which the master document is locked.
 2. Point to **Project**, point to **Locks**, then click **Unlock Master Document**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To unlock a master document from the project copy:

1. Select the project copy to which the master document is locked.
2. From the **Document** menu, select **Managed Change (Master/Project Copy)**, and click **Unlock Master Document**.

The red lock icon next to the master document in the Navigation view will disappear and its **Locked** property will be set to **No**, indicating that the document has been unlocked.

Unlock a Master Document From the Master Document

To unlock a master document from the master document itself, you don't need to know from which project copy it was locked. However, you can find out easily with the **Show Project Copies** command described in [Show Master And Project Copies](#).

PowerWeb Procedures

To unlock a master document from the master document itself:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project copy to which the master document is locked.
 2. In the **Project** ribbon, in the **Locks** group, click **Unlock from Project**.
 - From the context menu:
 1. Right-click the project copy to which the master document is locked.
 2. Point to **Project**, point to **Locks**, then click **Unlock from Project**.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy to which the master document is locked.
 2. Point to **Project**, point to **Locks**, then click **Unlock from Project**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To unlock a master document from the master document itself:

1. Select the master document to be unlocked.
2. From the **Document** menu, select **Managed Change (Master/Project Copy)**, and click **Unlock from Folder (Unlock from Project)**.

The red lock icon next to the master document in the Navigation view will disappear and its **Locked** property will be set to **No**, indicating that the document has been unlocked.

Show Master And Project Copies

You can create multiple project copies from a single master document. The **Show Project Copies** command allows you to see both master documents and all of the project copies made from them in a single view. This enables you to locate the project copies and the master document from which they were created.

PowerWeb Procedures






Use these steps for [PowerWeb](#).


The **Master and Project Copies** page shows the current document and its references to the other documents in its family. The row of the selected document is highlighted to indicate its location in the family.

If your document type uses the concurrent engineering [waiting list](#), the priority column indicates the position of the project copy in the waiting list. You can [manage a waiting list](#) on this page.

Status Icons



The icons on the **Master and Project Copies** page indicate the status of a document:

-  — Locked document from which project copies have been created. This might be the master document or a project copy.
-  — active project copy
-  — Waiting project copy. The document is in a waiting list and is read-only because it has not yet reached the top of the list. You cannot:
 - change the document type
 - change the workflow state
 - create a sub project copy
 - download the document
 - modify or annotate renditions
 - modify references
 - release the waiting project copy to master
 - replace content.
-  — Unchanged document.
-  — Document under change or quick change.




-  — An information project copy. The document is located in a project folder, but is not shown on the **Master and Project Copies** page. You can add the document to a package for information, but you cannot:
 - change the content natively, on renditions, or annotate it
 - change the properties
 - start a workflow
 - release to master
 - transfer to another project
 - transfer to next waiting project copy.

View Master and Project Copies Page

To view the Master and Project Copies page:

1. Choose one of the following options:
 - From the ribbon:
 - a. Select either a master document or a project copy.
 - b. In the **Project** ribbon, in the **Show Master and Project Copies** group, click **Show master and project copies**.
 - From the context menu:
 - a. Right-click either a master document or a project copy.
 - b. Point to **Managed Change (Project)**, and then click **Show master and project copies**.
 - From [the Thumbnails view](#):
 - a. Right-click the thumbnail of a master document or a project copy.
 - b. Point to **Project** and then click **Show master and project copies**.
 - From the view bar:
 - a. Select either a master document or a project copy.
 - b. In the view bar click the **Master and project copies** icon .
 - On the **Document** page:
 - a. Select either a master document or a project copy.
 - b. On the **Document** page next to the document name, click the **Show master and project copies** icon .

The **Master and Project Copies** page appears and shows the current document and its references to the other documents in its family. The row of the current document is highlighted so that you know where you are within the family.

The work-in-progress icon is red  for master documents, blue  for project copies, and crossed shovels  for inactive project copies.

2. Choose one or more of the following options:

- To see the path of a document, hover your cursor over the document name.
- To use the shortcut menu for the document, right-click the document name.
- To hide obsolete project copies, click **Hide inactive project copies**.
 - *Active project copies* are those project copies that have not yet been reconciled with the master document. That is, either superseded by the master document or merged with the master document.
 - *Inactive project copies* are those project copies that have already been reconciled with their master document.
- To go to a different document in the family, click the document name.

If the document cannot be shown in the current view, it is shown in the **Folders** view.


- To compare two copies, select the copies that you want to compare and then in the **Project** ribbon, in the **Master and Project Copies** group, click **Compare** or **Compare Renditions**.

PowerUser Procedures




Use these steps for [PowerUser](#).

To view the references between master documents and project copies:

1. Select either a master document or a project copy.
2. On the **Document** menu, point to **Managed Change (Master/Project Copy)** and click **Show Project Copies**.

A reference browser dialog will appear similar to the following figure. The reference browser can also be displayed by clicking the work-in-progress icon  on the **Document** page of the selected document.

Note:

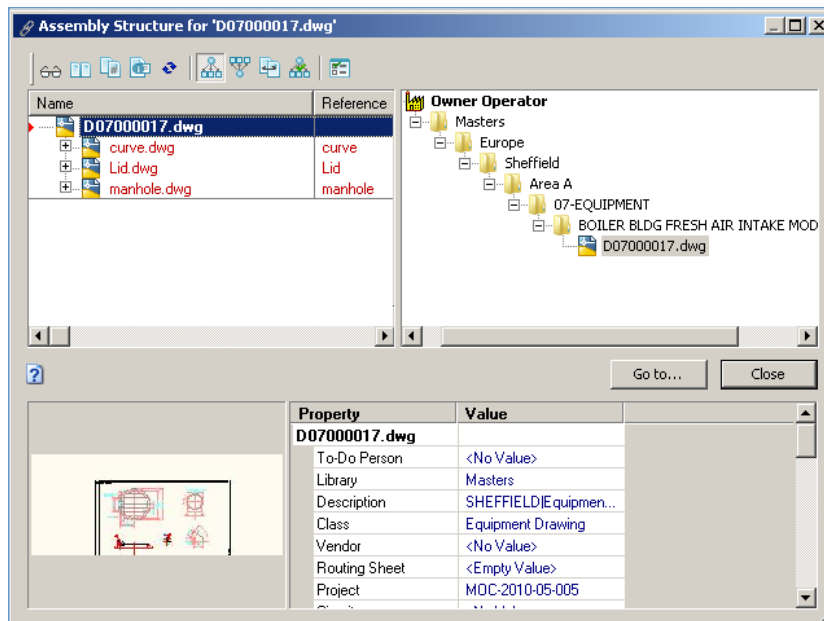
The work-in-progress icon is red  for master documents, blue  for project copies, and crossed shovels  for inactive project copies.

Active project copies are those project copies that have not yet been reconciled with the master document. That is, either superseded by the master document or merged with the master document.

Inactive project copies are those project copies that have already been reconciled with their master document and are shown in gray in the reference browser. Inactive project copies may be hidden from viewing in the reference browser by disabling the **Display inactive project copies** option in the **Options** dialog accessed by the **Options** button.



3. Select a document in the upper-left pane to view its path in the upper-right pane.
4. Click **Go to** to close the reference browser and make the selected document the selected document in the Navigation view.

Click **Close** to close the reference browser and return to the selected document in the Navigation view.



Following are descriptions of the three panes of the reference browser dialog.

- The upper-left pane displays a tree view of the master document and each of its project copies. Project copies are listed below and indented from the master document. The selected document is shown in bold text. Documents under change by you are shown in blue text. Inactive project copies are shown in gray text.

If the master document is locked in a project folder, a red lock icon  is shown next to the master document's name and a blue lock icon  is shown next to the name of the project copy to which the master document is locked.

- The upper-right pane displays the path of the document selected in the upper-left pane.











- The lower pane displays those properties that have been configured by a System Administrator to appear in the reference browser. If a thumbnail image is available for the selected document, it also appears in the lower pane.

Note:

Right-click a document in the upper-left pane to display the document context menu. Document commands that are valid for the current context, project workflow state, and document workflow state are available for use.

The toolbar buttons are described in the following table.

Reference Explorer toolbar buttons

Option	Description
	Opens the selected document in a new viewer window.
	Compares two selected documents.
	Shows the revisions of the selected document.
	Show the property pages of the selected document.
	Refreshes the Reference Explorer to display the most recent changes.
	Shows outgoing CAD external reference types.
	Shows incoming CAD external reference types and custom reference types.
	Shows Derived From and Derived To reference types.
	Shows project copies and their master documents. Requires the Advanced Project Workflow Module.
	<p>When creating copies, shows the assembly copy options. When viewing references, shows visibility options for manual references and inactive project copies:</p> <ul style="list-style-type: none"> • Display manual references — Show only references that can be created manually and are not created automatically by application links. Enabled by default. • Display inactive project copies — Along with active project copies, also show project copies that have been released as new master revisions, have been superseded by the master document, or have been merged with the master document. Enabled by default.

Link To a Master Document

Linking to a master document can be useful when you import a new document into a project folder from outside the vault. In this scenario, the document should have become a project copy of a master document that resides in the vault, but it was not copied from the master document using a managed change command. Linking the new project copy will create a reference to the master document that you select and will create a revision of the master document when the linked copy is released.

Note:

The command is unavailable if:

- You select the two documents in the reverse order.
- One of the documents is under change.
- The imported document is already linked to a master document.
- The imported document is not in a project folder.
- The master document is not in a higher folder level than the project folder.
- The master document already has a project copy.

PowerWeb Procedures

Use these steps for [PowerWeb](#).


To link an imported document to a master document:

1. Choose one of the following options:
 - From the ribbon:
 - a. Select the imported document.
 - b. In the **Project** ribbon, in the **Links** group, click **Link to Master Document**.
The **Find Master Document** dialog box appears.
 - From the context menu:
 - a. Right-click the imported document.
 - b. Point to **Managed Change (Project)**, and then click **Link to Master Document**.
The **Find Master Document** dialog box appears.
 - From [the Thumbnails view](#):

- a. Right-click the thumbnail of the imported document.
- b. Point to **Project** and then click **Link to Master Document**.

The **Find Master Document** dialog box appears.

2. Select options and type values to find the master document and then click **Find Now**.
3. Select the master document in the list and click **Link to Master**.


The imported document is made a project copy of the selected master document. On the **Document** page of both documents, the reference icon appears next to the document name (if it did not already) and the project copy status icon  appears next to the label **Workflow**. The new reference can be viewed as described in [Show Master And Project Copies](#).

PowerUser Procedures

Use these steps for [PowerUser](#).

To link an imported document to a master document:

1. Select the master document to which you want to link to the imported document.
2. Select the imported document.
3. From the **Document** menu, point to **Managed Change (Master/Project Copy)**, and select **Link to Master Document**.
4. Select the master document and click **Link to Master Document**.

The imported document is made a project copy of the selected master document. On the **Document** page of both documents, the reference icon appears next to the document name (if it did not already) and the project copy status icon  appears next to the label **Workflow**. The new reference can be viewed as described in [Show Master And Project Copies](#).

Unlink From a Master Document

Unlinking from a master document can be useful if the project copy was originally made from a master document but the project copy should no longer be released as a revision of the master document but instead released as a new master document. Unlinking the project copy will remove from the master document the reference that was created when the project copy was made from the master document. Unlinking will also unlock the master document if it was locked when the project copy was made.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To unlink a project copy from a master document:

- Choose one of the following options:
 - From the ribbon:
 1. Select the project copy that you want to unlink.
 2. In the **Project** ribbon, in the **Assign** group, click **Unlink from Master Document**.
A dialog box opens, asking you to confirm your choice.
 3. Click **Yes**.
The project copy is unlinked from the master document.
 - From the context menu:
 1. Right-click the project copy that you want to unlink, point to **Managed Change (Project)**, and then click **Unlink from Master Document**.
A dialog box opens, asking you to confirm your choice.
 2. Click **Yes**.
The project copy is unlinked from the master document.
 - From [the Thumbnails view](#):
 1. Right-click the thumbnail of the project copy.
 2. Point to **Project** and then click **Unlink from Master Document**.
A dialog box opens, asking you to confirm your choice.
 3. Click **Yes**.
The project copy is unlinked from the master document.

PowerUser Procedures

Use these steps for [PowerUser](#).

To unlink a project copy from a master document:

1. Select the project copy that you want to unlink.
2. From the **Document** menu, point to **Managed Change (Master/Project Copy)**, and click **Unlink from Master Document**.

A dialog box opens, asking you to confirm your choice.

3. Click **Yes**.

The project copy is unlinked from the master document.

Subscribe To Changes

When you are responsible for important documents that could be changed by others, you might want to be notified when changes occur of which you are not aware. You can subscribe to those documents to receive email messages when events occur that you are interested in. You may also subscribe to receive reminders for specific documents for which a System Administrator has configured periodic reminders. If you have the **Allow Management of Subscriptions for others** privilege, you can add or remove subscriptions for other users.

Notes About Functionality

- You might also receive event notifications or reminders for documents to which you did not subscribe. These could be the result of automatic notifications configured by a System Administrator.
- For folder subscriptions you can subscribe to events that occur on documents contained in the folder at that moment. If a document is added to the folder later, you are not automatically subscribed to that document. For project subscriptions, you can subscribe to events that occur on the project, such as project workflow transitions.
- Subscriptions require some configuration by a System Administrator. Also, you must be a member of a group that has been granted the **Allow Subscriptions** or **Allow Management of Subscriptions for others** privileges in the folder containing the documents that you want to subscribe to. See the *Security Privilege Descriptions* section of the *Meridian Enterprise Configuration Guide* for more information.
- Notifications are only sent to your primary email address as set by a System Administrator and as described in the *Create and edit user accounts* article in the *Meridian Enterprise Administrator's Guide*.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Subscribe to Document or Folder

To subscribe to changes on a document or folder:

1. In any navigation view, select the documents or folders that you want to change subscriptions for.

2. Choose one of the following options:

- In the **Document** or **Folder** ribbon, in the **Action** group, click **Subscribe**.
- Right-click anywhere within your selection, point to **Document**, and then click **Subscribe** on the shortcut menu that appears.

The **Subscribe** dialog box appears and lists the available events and reminders that you can subscribe to. The events to which you have already subscribed are selected.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Choose between two options:
 - Select **Folder** > **Subscribe**.
 - Select **Document** > **Subscribe**.

3. Select events you want to subscribe to for the selected documents or folders.

4. Click **Next**.

The next page of the dialog box opens.

5. Choose between two options:

- If you have the **Allow Management of Subscriptions for others** privilege, select the users who should receive notifications about the selected documents.

You can only deselect yourself if at least one other user is selected.

- If you do not have the **Allow Management of Subscriptions for others** privilege, proceed to step 6.

6. Click **Next**.

The next page of the dialog box opens. This page lists the changes you have made and asks you to confirm them.

7. Click **OK**.

Unsubscribe from Document or Folder

To unsubscribe from changes on a document or folder:

1. In any navigation view, select the documents or folders that you want to change subscriptions for.

2. Choose one of the following options:

- In the **Document** or **Folder** ribbon, in the **Action** group, click **Unsubscribe**.
- Right-click anywhere within your selection, point to **Document**, and then click **Unsubscribe** on the shortcut menu that appears.

The **Unsubscribe** dialog box appears and lists the available events and reminders that you can unsubscribe from.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder or document.
 - b. Choose between two options:
 - Select **Folder** > **Unsubscribe**.
 - Select **Document** > **Unsubscribe**.

3. Select events you want to unsubscribe from for the selected documents or folders.
4. Click **Next**.

The next page of the dialog box opens.

5. Choose between two options:
 - If you have the **Allow Management of Subscriptions for others** privilege, select the users who should no longer receive notifications about the selected documents.
You can only deselect yourself if at least one other user is selected.
 - If you do not have the **Allow Management of Subscriptions for others** privilege, proceed to step 6.

6. Click **Next**.

The next page of the dialog box opens. This page lists the changes you have made and asks you to confirm them.

7. Click **OK**.

Subscribe to Project

To subscribe to changes on a project:

1. In any navigation view, select the projects that you want to change subscriptions for.
2. Choose one of the following options:
 - To take action from the **Folder** ribbon:
 - a. In the **Folder** ribbon, in the **Action** group, click the down arrow next to **Subscribe**.
 - b. Select **Subscribe to Project** from the menu that appears.
 - Right-click anywhere within your selection, point to **Folder**, and then click **Subscribe to Project** on the shortcut menu that appears.

The **Subscribe** dialog box appears and lists the available events and reminders that you can subscribe to. The events to which you have already subscribed are selected.

- From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder.
 - b. Select **Folder** > **Subscribe to Project**.
- 3. Select events you want to subscribe to for the selected projects.
- 4. Click **Next**.

The next page of the dialog box opens.
- 5. Choose between two options:
 - If you have the **Allow Management of Subscriptions for others** privilege, select the users who should receive notifications about the selected documents.

You can only deselect yourself if at least one other user is selected.
 - If you do not have the **Allow Management of Subscriptions for others** privilege, proceed to step 6.
- 6. Click **Next**.

The next page of the dialog box opens. This page lists the changes you have made and asks you to confirm them.
- 7. Click **OK**.

Unsubscribe from Project

To unsubscribe from changes on project:

1. In any navigation view, select the project that you want to change subscriptions for.
2. Choose one of the following options:
 - To take action from the **Folder** ribbon:
 - a. In the **Folder** ribbon, in the **Action** group, click the down arrow next to **Unsubscribe**.
 - b. Select **Unsubscribe from Project** from the menu that appears.
 - Right-click anywhere within your selection, point to **Folder**, and then click **Unsubscribe from Project** on the shortcut menu that appears.

The **Unsubscribe** dialog box appears and lists the available events and reminders that you can unsubscribe from.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a folder.
 - b. Select **Folder** > **Unsubscribe from Project**.
3. Select events you want to unsubscribe from for the selected documents.

4. Click **Next**.

The next page of the dialog box opens.

5. Choose between two options:

- If you have the **Allow Management of Subscriptions for others** privilege, select the users who should no longer receive notifications about the selected documents.
You can only deselect yourself if at least one other user is selected.
- If you do not have the **Allow Management of Subscriptions for others** privilege, proceed to step 6.

6. Click **Next**.

The next page of the dialog box opens. This page lists the changes you have made and asks you to confirm them.

7. Click **OK**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To subscribe to or unsubscribe from changes:

1. In any navigation view, select the documents that you want to change subscriptions for.
2. On the **Document** or **Folder** menu, select **Change Subscription**.

The **Change Subscription** dialog box appears and lists the available events and reminders that you can subscribe to. The events to which you have already subscribed are selected.

Changes to the selected events in this list are not saved if you click the **Subscribers** button and will be reset when that dialog is closed. If you want to change the subscriptions of other users, select the subscribers in the next step first and then change the events to which they are subscribed.

3. To change the subscriptions of other users:

- a. Click **Subscribers**.

The **Subscribers** dialog box appears and lists all system users. By default, your name is selected to change only your subscription options.

- b. Select or clear user names to change their subscriptions to the selected items.
- c. Click **OK**.

4. Select or clear events and reminders to change the subscriptions to the selected items for the users that you selected.

The check boxes shown by this dialog box can represent three states that indicate how many of the selected subscribers are subscribed to the corresponding event.

5. To view the names of the subscribers for a specific event, select the event and click **Subscribers**.

The **Subscribers** dialog box appears and lists the users that are subscribed to the selected event.

6. Click **OK**.

View And Remove Subscriptions

You can view all of your subscriptions at once with the subscriptions viewer in a web browser. There you can filter and sort subscriptions to meet your needs and remove unwanted subscriptions.

Note:

A System Administrator must install and configure subscriptions to use this command.


PowerWeb Procedures


Use these steps for [PowerWeb](#).

To open the subscriptions viewer:

1. In any navigation view, select the documents or project folders that you want to change subscriptions for.
2. In the **Document** or **Folder** ribbon, in the **Actions** group, click **Change Subscription**.

A page titled **Meridian: Subscriptions viewer** opens in a new tab. The subscriptions are sorted on the column indicated by the arrow icon ↓ in the column heading. Your privileges to manage the subscriptions are shown at the bottom of the page.

3. To change the sort order or select a filter:
 - a. Point to a column heading.
 - b. Click the arrow button  that appears.
 - c. Click the sort option or filter that you want on the shortcut menu that appears.

If you selected a sort option, the arrow icon ↓ appears in that column heading. If you selected a filter, the filter icon  appears in that column heading.

PowerUser Procedures

Use these steps for [PowerUser](#).

Open Subscriptions Viewer

To open the subscriptions viewer:

1. In the **Tools** menu, click **View Subscriptions**.

A page titled **Meridian Enterprise 2022: Subscriptions viewer** opens in a browser window. The subscriptions are sorted on the column indicated by the arrow icon ↓ in the column heading. Your privileges to manage the subscriptions are shown at the bottom of the page.

2. Continue as described in step 2 above.

Remove Subscriptions

To remove subscriptions:

- Select the subscriptions that you want to remove, select **Unsubscribe** in the command list, and click **Execute**.

The view refreshes to show the subscriptions removed.

Shared Workspace Folders

By default, when you work on documents in a vault folder, copies are made in your local workspace folder for best performance and compatibility with the applications that you use. For more information about local workspace, see [Local Workspace](#). However, some applications require multi-user access to project and other data files that is incompatible with local workspace. For those applications, Meridian provides shared workspace folders.

Notes about Functionality

A shared workspace is a custom type of folder in a vault that Meridian manages in special ways:

- Instead of downloading to the local workspace folder on your computer for you to view and edit exclusively, the documents download to a shared network location for shared viewing and editing.

Note:

With PowerWeb, documents that are viewed or edited are first downloaded to your local workspace before they are copied to the shared workspace folder. Renditions are also downloaded to your local workspace but are not copied to the shared workspace folder because renditions are read-only.

Important!

If a document is locked in the shared folder but changed in a local workspace, the version in the shared folder is considered as the correct version and can overwrite the changes made otherwise. For this reason, you should not attempt to circumvent the system and you should use workflows to make all document changes to ensure proper synchronization.

- The contents of the shared workspace can be automatically synchronized with its corresponding vault folder if configured by a System Administrator. You can manually synchronize the folder (download) from the vault with the **Lock Documents and Sync Workspace** command on the **Folder** menu in PowerUser. You can synchronize the vault from the folder (upload) with the **Sync Workspace** command.

When synchronization occurs:

- Documents in the shared folder that are in a writable workflow state are updated with any changes in the vault.
- Documents in the vault that are in a writable workflow state are updated with any changes in the shared folder.

- New documents in the folder are created in the vault. If the folder option **Default document type for new documents** is set, the documents are assigned that type. Otherwise, they are assigned the default document type for the file extension. During manual synchronization, if the folder option **Show wizard on creation of new documents** is enabled, the wizard for the document type of each new document is shown for input. If the wizard is canceled, the document is not created.
- During manual synchronization, if the folder option **Delete documents from workspace when released from workflow** is enabled, released documents are deleted from the folder. Released documents are copied to the shared folder if they are viewed or if they are referenced by other documents in the folder that are opened for editing.
- Shared workspace folders can be created and configured as described in *Configure Shared Workspaces* if you have the **Edit shared workspace settings** privilege as described in *Security Privilege Descriptions*. Both of these articles are in the *Meridian Enterprise Configuration Guide*. For information about how shared workspaces are configured in your organization, consult a System Administrator.
- A shared workspace can also be a project folder as described in [Project Folders](#).

Best Practices

To work with documents in a shared workspace folder:

- One person (the workgroup leader or project manager, for example) should be assigned as the shared workspace manager.
- Only the shared workspace manager should place the shared workspace documents under change and release them as they normally would.
- Any person may synchronize the workspace with the vault.
- Any person may edit the documents in the shared network location that is associated with the parent vault folder.

Configure Options

To configure the options for a shared workspace folder:

- Edit the options in the **Sharing details** group on the **Folder** tab of the folder as described in the *Configure Shared Workspaces* article in the *Meridian Enterprise Configuration Guide*. You must have the **Edit shared workspace settings** privilege to modify the options as described in the *Security Privilege Descriptions* article in the *Meridian Enterprise Configuration Guide*.

Packages

A package in Meridian Enterprise is a set of documents contained in an archive (ZIP) file. There are two types of packages available: *export packages* and *import packages*. Packages are similar to briefcases but simpler. However, the two are different and are not interchangeable.

You can use export packages to send documents to people who do not have access to Meridian Enterprise, for example, as simple transmittals. The most important way that export packages are different from briefcases is that export packages are sent by Meridian Enterprise Server to a different storage system (Windows file system, FTP site, cloud service, etc.), not to a person by email. Meridian Enterprise Server uses the Publisher system links to transfer the packages for you. The rest is automatic but you can monitor the status of the package in Meridian Explorer to verify that it was sent. You may also view packages that have already been sent and search for documents inside packages.

An *import package* is a set of documents contained in an archive (ZIP) file and an accompanying MS Excel workbook that contains metadata about the package documents. Import packages can be imported into a Meridian Enterprise vault through Meridian Explorer. The packages can be created by Meridian Explorer, manually by users, or by some other system and sent to Meridian Enterprise Server.

The following topics describe the different ways that you can work with export packages in Meridian Enterprise. For information about working with import packages in Meridian Explorer, see *Import With Packages* in the *Meridian Explorer User's Guide* .

View Related Packages

Meridian vault documents can be published to Meridian Explorer repositories for viewing by other users in the Meridian Explorer web application. Meridian Explorer users can also export the documents (if the repository is configured to do so by a System Administrator) to *export packages* for use by business partners.

Conversely, Meridian Explorer users can import documents into the Meridian Enterprise vault with *import packages*.

Meridian keeps track of all these relationships so that you don't have to. From within PowerUser or PowerWeb, you can easily see the names of the export packages and import packages that contain a selected document.

For information about working with packages in Meridian Explorer, see *Packages* in the *Meridian Explorer User's Guide*.

Note:

- The **Export Packages** and **Import Packages** pages are disabled by default and must be enabled by a System Administrator as described in the *Property Page Events* article in the *Meridian Enterprise VBScript API Reference Guide*.
- The dates shown for import package in PowerWeb and Meridian Explorer are shown in GMT format. In PowerUser they are converted to the local time zone.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

View Import and Export Packages Related to a Document

To view the import packages and export packages related to a document:

1. Select the document for which you want to view its related packages.
2. Click the **Export Packages** or the **Import Packages** tab.

The **Export Packages** page lists the export (outgoing) packages that include the selected document. The **Import Packages** page lists the import (incoming) packages from which the selected document was imported.

3. To view an individual package, click the name of the package that you want to view.

The **Collections** view opens in Meridian Explorer in a new browser window with the selected package highlighted.

View All Import Packages in System

To view all the import packages in the system:

Choose between two options:

- In the **Vault** ribbon, in the **Package** group, click **Import Packages**.
- In any navigation view, right-click any document, point to **Vault**, and then click **Show Import Packages**.

The **Import Packages** page opens in Meridian Explorer in a new browser window.

View All Export Packages Related to the Current Vault

To view all the export packages related to the current vault:

Choose between two options:

- In the **Vault** ribbon, in the **Package** group, click **Export Packages**.
- On the **Export Packages** page of any document, click **See all packages**.

The **Collections** view opens in Meridian Explorer in a new browser window.

PowerUser Procedures

Use these steps for [PowerUser](#).

View Import and Export Packages Related to a Document

To view the import packages and export packages related to a document:

1. Select the document for which you want to view its related packages.
2. In the **Properties** pane, click the **Export Packages** or the **Import Packages** tab.

The **Export Packages** page lists the export (outgoing) packages that include the selected document. The **Import Packages** page lists the import (incoming) packages from which the selected document was imported.

3. To view an individual package, right-click the row of the package that you want to view and then click **Show package** on the shortcut menu that appears.

The **Collections** view opens in Meridian Explorer in a new browser window with the selected package highlighted.

View All Import Packages in System

To view all the import packages in the system:

- On the **Tools** menu, click **Show Import Packages**.

The **Import Packages** page opens in Meridian Explorer in a new browser window.

View All Export Packages Related to the Current Vault

To view all the export packages related to the current vault:

- On the **Tools** menu, click **Show Export Packages**.

The **Collections** view opens in Meridian Explorer in a new browser window.

Add Documents To Packages

Meridian Explorer users can export documents to *export packages* for use by business partners. You can add documents to these packages from within Meridian Enterprise or create new packages for export by Meridian Explorer users.

Notes About System Behavior

- When you add documents to a package, only the current revision of the document is added and the package will only appear on the **Export Packages** property page of that revision. Subsequent revisions of the document will not show the package unless you view the prior revision of the document as described in [View Prior Revisions](#).
- Depending on the configuration of the publishing job that is assigned to a package, documents that you add to the package might be locked after the package is sent. For information about unlocking such documents, see [Lock And Unlock Documents](#).
- Adding documents to a package can fail for a variety of reasons including:
 - Document properties do not pass validation by the vault's configuration. Edit the properties of the document to set any required values and correct any invalid values in Meridian first, then add the documents to a package.
 - Documents do not pass assembly reference validation. Be sure to include all referenced documents in your selection before adding them to a package.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Create a New Export Package

To create a new export package:

1. On the **Export Packages** property page of any document, click **New Package**.
The **New Package** dialog box appears.
2. Complete the following fields:
 - **Name** — The name of the package as it should appear to others.
 - **Recipient** — The email addresses of the persons that will be notified about the package. Separate multiple email addresses with commas (,).

- **Description** — A description of the package as you want others to see it.
 - **Include Content** — Select which document content to include in the package: the source document, the rendition, or both.
 - **Related Project** — If this document is associated with a project, this field will auto-populate with the project the document is associated with. If this document is not associated with a project, you can choose to select a project from this field. You are not required to choose a project from this field.
 - **Export Destination** — Select a destination where to create the package.
3. Click **Create**.
- The package is created and can be selected in the preceding task.

Add Documents to an Existing Package

To add documents to an existing package:

1. Choose one of the following options:
 - From the context menu:
 - a. Select the documents that you want to add to a package.
 - b. Right-click anywhere within your selection, point to **Vault**, and then click **Add to Export Package** on the shortcut menu that appears.
The **Add to Export Package/Select Package** dialog box appears.
 - From the ribbon:
 - a. Select the documents that you want to add to a package.
 - b. In the **Exchange** ribbon, in the **Package** group, click **Add to Export Package**.
The **Add to Export Package/Select Package** dialog box appears.
 - From [the Thumbnails view](#):
 - a. Right-click a thumbnail of a document.
 - b. Select **Document > Add to Export Package**.
The **Add to Export Package/Select Package** dialog box appears.
2. Select the package to which you want to add the documents.
3. If you want to include CAD references, select the check box.
4. Click **OK**.

A progress dialog box appears and shows the results of adding the documents to the package. If any documents fail property value validation or assembly reference validation, they are not added to the package.

Add Search Results to Existing Export Package

To add a batch of files to an existing export package:

1. [Conduct a search.](#)
2. Select the **Search Results** heading.

This will apply the command you select to all results in your search, including results on subsequent pages.
3. Select the **Add to Export Package** command from the **Exchange** tab.

The **Add to Export Package/Select Package** dialog box appears and lists the existing export packages.
4. Select the package to which you want to add the documents.
5. If you want to include CAD references, select the check box.
6. Click **OK**.

A progress dialog box appears and shows the results of adding the documents to the package. If any documents fail property value validation or assembly reference validation, they are not added to the package.

PowerUser Procedures

To add documents to a new or existing package:

1. Select the documents that you want to add to a package.
2. Right-click anywhere within your selection and then click **Add to Export Package** on the shortcut menu that appears.

The **Select Package** dialog box appears and lists the existing export packages.
3. If the package you want to add the documents to does not yet exist and you want to create a new package:

Note:

If you proceed, you will not be able to assign the package to a project. If you want to assign the package to a project, create the package first and assign it to the project and then add the documents to the package.

- a. Click **Create new package**.

The **Create new package** dialog box appears.
- b. Click options or type values using the descriptions in the preceding table.

c. Click **OK**.

The new package appears in the package list.

4. Select the package to which you want to add the documents and then click **OK**.

A progress dialog box appears and shows the results of adding the documents to the package. If any documents fail property value validation or assembly reference validation, they are not added to the package.

Tags

Meridian links asset information obtained from a maintenance management system to documents shown in Meridian Enterprise. This provides convenient access to asset data to engineering users to manage the links.

In PowerUser, tag management appears as an additional property page for documents:

- **Tags** — shows the assets that are linked to a selected document.

The tags reside in the Meridian Enterprise vault and can be related to the documents or other tags. The tags act as proxies for the maintenance management system assets. The tags are created and periodically updated by Meridian from data that resides in your maintenance management system. You explicitly link them to documents in Meridian Enterprise based on the relationships between the document data and tag data.

You can link documents or tags to tags or vice versa; both methods are supported. The configuration of the linking is done in Meridian Enterprise Configurator by a System Administrator. This page is also used to find and link tags to documents.

And one or more additional property pages for tags (assets):

- **Where Used** — shows the documents that are linked to a selected tag. This page is also used to find and link documents to tags.
- **Tags** — shows the other tags that are linked to a selected tag. This page is also used to find and link tags to tags.

This page is optional and must be registered and configured in the vault by a System Administrator as described in [Property Pages And Wizard Pages](#).

This page is optional and must be registered and configured in the vault by a System Administrator as described in *Property Pages And Wizard Pages* in the *Meridian Enterprise Configuration Guide*.

Meridian also provides a **Find Tags** command that can be used to perform simple searches for tags.

In PowerWeb, the same **Related Tags** and **Where Used** pages are available if configured by a System Administrator.

The columns and search fields that are shown by Meridian are configured by a System Administrator. For more information about configuration, see *Configure Column Display* in the *Meridian Enterprise Configuration Guide*.

Note:

Many of the following topics instruct you to click the **Manage Links** button on property pages in PowerUser to create and edit the relationships with tags. Typically, to edit the information shown on property pages, you must first click the **Edit** button on the property page.

This is not necessary for the Meridian property pages in PowerUser. However, it is necessary to first click the **Edit** button on the property page in the PowerWeb.

In PowerWeb, the links are created or removed immediately after clicking the appropriate button, not after clicking **OK** or **Apply** as is usual. Also, clicking **Cancel** in PowerWeb does not revoke the actions that you have taken while in edit mode.

Maximo Integration

Even without Meridian, Maximo provides a **Linked Documents** page that shows documents that are linked to the selected tag. However, Maximo provides no formal revision control, workflow, or approval processes for these documents. You are never sure if you are looking at an up-to-date or obsolete document. This can lead to costly errors in both the maintenance and engineering departments because the incorrect revision of a document can be linked.

Meridian provides the necessary control over documents, their revisions, workflow, and approval along with managing links to externally referenced documents. When integrated with a maintenance management system, the two systems work together to provide a comprehensive solution that eliminates costly errors caused by working with incorrect or obsolete tag information or documents.

If you are a maintenance department user, little change to your work methods is required; you can continue to use Maximo normally. But you will notice additional information on the **Attached Documents** or **Linked Documents** page or an **Engineering Documents** button on certain forms. When the button is clicked, the related document information is shown in Meridian Explorer in a web browser window. This additional functionality is provided by the Meridian and the information that is shown resides in a Meridian Explorer repository that is synchronized with a Meridian Enterprise vault.

Note:

In the remainder of this document, the term **Linked Documents** refers to the corresponding page described above, depending on the version of Maximo installed by your organization.

The integration and configuration of Maximo with Meridian Enterprise is described in the *Integrate With Maximo 7* article in the *Meridian Enterprise Configuration Guide*. This section only describes the Meridian features that are shown in Maximo. This functionality may be similar to or may be absent from other maintenance management systems integrated with the Meridian.

Integration With Other Systems

The integration of the Meridian with maintenance management systems other than Maximo (for example, SAP Plant Maintenance or Ultimo) is much the same as for Maximo. Instead of a **Linked Documents** page, typically a **Linked Documents** button is added to one or more other pages. When the button is clicked, the related document information is shown in Meridian Explorer in a web browser window.

Note:

Integration of the Meridian is specific to each maintenance management system. Therefore professional services are needed to meet your organization's specific requirements.

View Linked Tags

If revisions to tags are controlled by the management of change features of Meridian Enterprise, that is, changes must be made to a copy in a project, all master and project copies of the tags will appear in the **Tags** page so that you can see the all of the dependencies on the document.

Use these steps for [PowerUser](#) and [PowerWeb](#).

View Linked Tags

To view linked tags:

- View the **Tags** property page.

The tag information appears in tabular format so that you can easily identify many tags.

Sort Tags


To sort the tags:

- Click the header of the column by which you want to sort the tags.

To reverse the sort order, click the header again.

Filter Tags by Property Values

To filter the tags by property values:

1. Click the arrowhead button  in the column header by which you want to filter the tags.
2. Select a predefined filter from the list that appears.

You may select filters in multiple columns.

3. To clear a filter, select the **All** filter.

View Linked Tag Information in Property Pages

To view linked tag information in property pages instead of tabular format:

- Double-click the row of the tag that you want to view or select the row and click **Go to Tag**.

The selected tag becomes the active tag and you can view its property pages.

View Linked Documents

You can view each dependency of a tag on the **Where Used** page.

If document revisions are controlled by Meridian Enterprise change management and changes must be made to a project copy, all master and project copies appear on the **Where Used** page.

View Linked Documents

Use these steps for [PowerUser](#) and [PowerWeb](#).

To view linked documents:

1. Select the tag that you want to view linked documents for.
2. Select the **Where Used** page.


The document information appears in tabular format so that you can easily identify many documents. The current path filter is shown below the document list.

To view document information in property pages instead of tabular format, select the row of the document that you want to view.

(PowerWeb only) View Tag in Rendition

Use these steps for [PowerWeb](#).

To view the tag in a rendition:

1. Select the tag you want to view.
2. On the **Where Used** page, in the row of the document that you want to view, select the **View Rendition** icon .

The viewer opens with the document zoomed in on the selected tag.

Filter Documents by Different Path

Use these steps for [PowerUser](#) and [PowerWeb](#).

To filter the documents by a different path:

1. Click **Path Filter**.
2. Select the folder that contains the documents that you want.

The new path filter appears in the text box and the list of linked documents is updated to show only the documents that reside in the selected path and its sub-folders.

Sort Documents

Use these steps for [PowerUser](#) and [PowerWeb](#).


To sort the documents:

1. On the **Where Used** page, select the header of the column you want to sort the documents by.
2. If you want to reverse the sort order, select the header again.

Filter Documents by Property Values

Use these steps for [PowerUser](#) and [PowerWeb](#).

To filter the documents by property values:

1. Click the arrow head button  in the column header by which you want to filter the documents.
2. Select a predefined filter from the list that appears.
If you want to clear a filter, select **All**. You can select filters in multiple columns.

View Document Information in Property Pages

Use these steps for [PowerUser](#) and [PowerWeb](#).

To view document information in property pages instead of tabular format:

- Double-click the row of the document that you want to view or select the row and click **Go to Document**.
The document is selected and you can view its property pages.

View Selected Documents in Viewer Window

Use these steps for [PowerUser](#) and [PowerWeb](#).

To view selected documents in a viewer window:

1. Select the row of a document that you want to view.
2. Click **Show Viewer**.

A viewer window opens with the selected document loaded.

The viewer window will remain open until you close it and it will show whichever document you select in the **Where Used** page. To close the viewer window, click **Hide Viewer**.

To prevent the viewer window from being hidden behind other windows:

- a. Right-click the title bar of the viewer window. A shortcut menu appears.
- b. Click **Always on top**.

View in Full-Screen

Use these steps for [PowerUser](#) and [PowerWeb](#).

To view a document full-screen:

1. Select the row of a document that you want to view.
2. Click **View Full-Screen**.

A viewer window opens full-screen with the selected document loaded.

3. To close the viewer window and return to PowerUser, click the **Close** button.

Search For Tags

You can search for tags using several methods, depending on what information you know about the tags that you want to find and your preferences:

- If you know values for the properties that are available in the Quick Find list in the **Find** toolbar, you can search with that method as described in [Quick Find](#)
- If you don't want to use the Quick Find list in the **Find** toolbar and you want to use more powerful search features, you can search with the **Find** command as described in [Find](#).
- If you want to find tags in the same way as in the **Manage Document Links** dialog, you can search with the **Find Tags** command as described in the remainder of this topic.

Search for Tags with Find Command

Use these steps for [PowerUser](#) and [PowerWeb](#).

To search for tags with the **Find** command:

- Perform the task described in [Find](#) and select **Tag Object** as the document type.

(PowerUser only) Search for Tags with Find Tags Command

Use these steps for [PowerUser](#).

If this property is part of a Field-Path definition, it is possible that when this command is used for the first time, the full list is not shown. In this case, first select a document in PowerUser and retry the **Find Tags** command.

To search for tags with the **Find Tags** command:

1. From anywhere in the vault, on the **Tools** menu click **Find Tags**.
The **Find Tags** dialog box appears.
2. Type search criteria in the text boxes in the top part of the dialog and click **Find**.
Any matching tags appear in the lower part of the dialog.
3. To make one of the tags the selected tag, double-click the tag in the list or select the tag in the list and click **Go to Tag**.
The dialog box closes and the selected tag becomes the selected tag.

Link Tags To a Document

Linking a tag to a document creates a Meridian Enterprise reference between the selected document and the selected tags in the vault. The reference is made with the **TagObject Reference** type. The reference becomes the link between document data in the vault and asset data in the maintenance management system that enables users of either system to view the data in the other system.

Linking tags to a document and linking documents to a tag as described in [Link Documents To a Tag](#) accomplish the same thing. The only difference is the point of reference, a tag or a document. You can use either method depending on which is more convenient for you.

Note:

You must have the **Edit Tag Assignments** privilege to perform this task and the current document must be the latest revision of the document.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To link tags to a document:

1. Select the document to which you want to link tags.
2. View the tags that are currently linked to the document as described in [View Linked Tags](#).

Confirm that the tags that you want to link are not already linked.

3. Click **Find Tags**.

The **Find Tags** dialog box appears.

The dialog box contains two sections. You use the top section to search for tags to link to the current document. The bottom section shows all of the tags that match the search criteria and that are not yet linked to the current document. You can only see 250 results at a time for performance reasons, unless you filter the **Find Tags** dialog box.

4. Type or select search criteria and click **Find**.

Any matching tags appear in the bottom section.

To refine your search, type or select search criteria and click **Find Now**.

Only the first page of tags is shown. To view more tags, use the page controls at the bottom of the search results list.

5. Select the tags in the bottom section of the dialog box that you want to link to the current document and click **Link**.

The tags are removed from the bottom section of the dialog box.

Click the icons in the header row to add or remove all of the found tags from your selection.

The links are created immediately after clicking the button. Also, clicking **Close** does not revoke the actions that you have taken.

6. Click **Close**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To link tags to a document:

1. Select the document to which you want to link tags.
2. View the tags that are currently linked to the document as described in [View Linked Tags](#).

Confirm that the tags that you want to link are not already linked.

3. Click **Manage Links**.

The **Manage Document Links** dialog box appears.

The dialog contains three sections. You use the top section to search for tags to link. The middle section shows all of the tags that match the search criteria and that are not yet linked to the selected document. The bottom section shows the currently linked tags.

4. Type search criteria in the top section of the dialog.

If an **Enable filtering** check box is visible in the top section, you can select it to filter the results using criteria that have been configured by a System Administrator. This can be helpful to exclude non-relevant documents. Click **Find**.

Any matching tags appear in the middle section. Only the first 250 tags are shown. To view more tags, click **Next**.

5. Select the tags in the middle section of the dialog that you want to link to the selected document and click **Create Links**.

The tags are moved to the bottom section of the dialog.

Press and hold the Ctrl key while clicking to add or remove tags from your selection. Press and hold the Shift key while clicking to select consecutive tags.

6. Click **Close**.

Link Documents To a Tag

Linking a document to a tag creates a Meridian Enterprise reference between the selected tag and the selected documents in the vault. The reference is made with the **TagObjectReference** type. The reference becomes the link between document data in the vault and asset data in the maintenance management system that enables users of either system to view the data in the other system.

Linking documents to a tag and linking tags to a document as described in [Link Tags To a Document](#) accomplish the same thing. The only difference is the point of reference, a tag or a document. You can use either method depending on which is more convenient for you.

Note:

You must have the **Edit Tag Assignments** privilege to perform this task and the current document must be the latest revision of the document.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To link documents to a tag:

1. Select the tag to which you want to link documents.
2. View the documents that are currently linked to the tag as described in [View Linked Documents](#).

Confirm that the documents that you want to link are not already linked.

3. Click **Find Documents**.

The **Find Documents** dialog box appears.

The dialog box contains two sections. You use the top section to search for documents to link to the current tag. The bottom section shows all of the documents that match the search criteria and that are not yet linked to the current tag.

4. Type or select search criteria and click **Find**.

Any matching documents appear in the bottom section.

To refine your search, type or select search criteria and click **Find Now**.

Only the first page of documents is shown. To view more documents, use the page controls at the bottom of the search results list.

5. Select the documents in the bottom section of the dialog box that you want to link to the current tag and click **Link**.

The documents are removed from the bottom section of the dialog box .

Select the check box in the header row to add or remove all of the found documents from your selection.

The links are created immediately after clicking the button. Also, clicking **Close** does not revoke the actions that you have taken while in edit mode.

6. Click **Close**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To link documents to a tag:

1. Select the tag in PowerUser to which you want to link documents.

For information on finding tags, see [Search For Tags](#).

2. Click the **Where Used** tab.

The **Where Used** property page lists the documents that are already linked to the selected tag. Confirm that the documents that you want to link are not already linked.

3. Click **Manage Links**.

The **Manage Tag Links** dialog box opens.

The dialog box contains three sections. You use the top section to search for documents to link. The middle section shows all of the documents that match the search criteria and that are not yet linked to the selected tag. The bottom section shows the currently linked documents.

4. Type search criteria in the top section of the dialog box.

If an **Enable filtering** check box is visible in the top section, you can select it to filter the results using criteria that have been configured by a System Administrator. This can be helpful to exclude non-relevant documents. and click **Find**.

Any matching documents appear in the middle section.

5. Select the documents in the middle section of the dialog that you want to link to the selected tag and click **Link**.

The documents are moved to the bottom section of the dialog.

Press and hold the Ctrl key while clicking to add or remove documents from your selection. Press and hold the Shift key while clicking to select consecutive documents.

6. Click **Close**.

Unlink Tags From a Document

Unlinking a tag from a document removes the reference to the tag so that the document will no longer appear on the **Linked Documents** page of the tag in the maintenance management system.

You must have the **Edit Tag Assignments** privilege to perform this task and the current document must be the latest revision of the document.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To unlink a tag from a document:

1. Select the document to which the tag is linked that you want to unlink.
2. View the tags that are currently linked to the document as described in [View Linked Tags](#).
Confirm that the tag that you want to unlink is listed.
3. Select the tags that you want to unlink and click **Unlink**.

The links are removed immediately and the tags are removed from the list.

Click the icons in the header row to add or remove all of the tags from your selection.

PowerUser Procedures

Use these steps for [PowerUser](#).

To unlink a tag from a document:

1. Select the document to which the tag is linked that you want to unlink.
2. View the tags that are currently linked to the document as described in [View Linked Tags](#).
Confirm that the tag that you want to unlink is listed.
3. Click **Manage Links**.

The **Manage Document Links** dialog box appears.

4. Choose between two options:

- Select the tags that you want to unlink and click **Remove Link**.

The tags are removed from the list.

- Double-click the tag that you want to unlink.

The tag is removed from the list.

Press and hold the Ctrl key while clicking to add or remove tags from your selection.

Press and hold the Shift key while clicking to select consecutive tags.

5. Click **Close**.

Unlink Documents From a Tag

Unlinking a document from a tag removes the reference to the document so that the document will no longer appear on the **Linked Documents** page of the tag in the maintenance management system.

Note:

You must have the **Edit Tag Assignments** privilege to perform this task and the current document must be the latest revision of the document.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To unlink a document from a tag:

1. Select the tag to which the document is linked that you want to unlink.
2. View the documents that are currently linked to the tag as described in [View Linked Documents](#).

Confirm that the document that you want to unlink is listed.

3. Select the documents that you want to unlink and click **Unlink**.

The links are removed immediately and the documents are removed from the list.

Click the icons in the header row to add or remove all of the documents from your selection.

PowerUser Procedures

Use these steps for [PowerUser](#).

To unlink a document from a tag:

1. Select the tag in PowerUser to which the document is linked that you want to unlink.
2. View the documents that are currently linked to the tag as described in [View Linked Documents](#).

Confirm that the document that you want to unlink is listed.

3. Click **Manage Links**.

The **Manage Document Links** dialog box appears.

4. Select the documents that you want to unlink and click **Remove Link**.

The documents are removed from the list.

Press and hold the Ctrl key while clicking to add or remove documents from your selection.

Press and hold the Shift key while clicking to select consecutive documents.

5. Click **Close**.

Link a Tag To Other Tags

Linking one tag to other tags creates Meridian Enterprise references between them in the vault. You must have the **Edit Tag Assignments** privilege to perform this task.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To link one tag to another tag:

1. Select the tag to which you want to link other tags.
For information on finding tags, see [Search For Tags](#).

2. Click the **Tags** tab.

This **Tags** property page is similar to, but different than, the **Tags** property page that appears when a document is selected. This page shows an additional icon that indicates the direction of the references between the tags, either incoming or outgoing. The page lists the other tags that are already linked to the selected tag. Confirm that the tag that you want to link is not already linked.

3. Click **Find Tags**.

The **Find Tags** dialog box appears.

The dialog contains two sections. You use the top section to search for tags to link to. The bottom section shows all of the tags that match the search criteria and that are not yet linked to the selected tag.

4. Type search criteria in the top section of the dialog and click **Find Now**.

Any matching tags appear in the bottom section.

5. Select the tags in the bottom section of the dialog that you want to link to the selected tag and click **Create Incoming Links** or **Create Outgoing Links**.

6. Click **Close**.

The **Tags** page refreshes to show that the tags are linked.

PowerUser Procedures

Use these steps for [PowerUser](#).

To link one tag to another tag:

1. Select the tag to which you want to link other tags.

For information on finding tags, see [Search For Tags](#).

2. Click the **Tags** tab.

This **Tags** property page is similar to, but different than, the **Tags** property page that appears when a document is selected. This page shows additional columns of icons that indicate the direction of the references between the tags, either incoming or outgoing. The page lists the other tags that are already linked to the selected tag. Confirm that the tag that you want to link is not already linked.

3. Click **Manage Links**.

The **Manage Tag to Tag Links** dialog box opens.

The dialog box contains three sections. You use the top section to search for tags to link to. The middle section shows all of the tags that match the search criteria and that are not yet linked to the selected tag. The bottom section shows the currently linked tags.

4. Type search criteria in the top section of the dialog and click **Find**.

Any matching tags appear in the middle section.

5. Select the tags in the middle section of the dialog that you want to link to the selected tag and click **Create Incoming Links** or **Create Outgoing Links**.

The tags are moved to the bottom section of the dialog.

Press and hold the Ctrl key while clicking to add or remove documents from your selection. Press and hold the Shift key while clicking to select consecutive tags.

6. Click **Close**.

Unlink a Tag From Other Tags

Unlinking one tag from another tag removes the reference between the tags.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To unlink one tag from another tag:

1. Select the tag to which the tag is linked that you want to unlink.
2. View the tags that are currently linked to the tag as described in [View Linked Tags](#).
Confirm that the tag that you want to unlink is listed.
3. Select the tags that you want to unlink and click **Unlink**.
The tags are removed from the list.

PowerUser Procedures

Use these steps for [PowerUser](#).

To unlink one tag from another tag:

1. Select the tag to which the tag is linked that you want to unlink.
2. View the tags that are currently linked to the tag as described in [View Linked Tags](#).
Confirm that the tag that you want to unlink is listed.
3. Click **Manage Links**.
The **Manage Tag to Tag Links** dialog box appears.
4. Select the tags that you want to unlink and click **Remove Links**.
The tags are removed from the list.
Press and hold the Ctrl key while clicking to add or remove tags from your selection. Press and hold the Shift key while clicking to select consecutive tags.
5. Click **Close**.

Create New Tags

Creating a new tag in the vault creates a new proxy to represent an asset. However, the new tag will not be synchronized with the maintenance management system and will not be available to maintenance users. Therefore, you should contact a maintenance management system user to add the desired tag to the system for you. The tag will then become available in the Meridian Enterprise vault after the next synchronization with the maintenance management system.

PowerWeb Procedures

Use these steps for [PowerWeb](#). This functionality was updated in the 2022 release.

To create a new tag:

1. Select the document in PowerWeb to which you want to link the tag that you will create.
2. Click the **Tags** property page.
3. Choose between two options:
 - Click **Drawing Tags**.
 - Click **Text Tags**.

The appropriate window opens. If there is a tag in the document which does not exist in the vault, the **Status** column contains a value of **No matching object found**.

4. Click the icon to the left of the **Object Number** column.

The **Add Document / Select Folder** window opens.

5. Select the folder where you want to create the tag.
6. Click **Next**.

The **Tag Details** window opens. Some of the tag information may have already auto-populated in this window.

7. Complete any necessary fields in the **Tag Details** window.
8. Click **Finish**.

The page refreshes. The tag is created in the location you specified. You can also view the tag on the **Tags** property page for the document.

PowerUser Procedures

Use these steps for [PowerUser](#).

To create a new tag:

1. Confirm that the tag does not already exist.
For this, you can use the **Find Tags** command described in [Search For Tags](#).
2. Select the document in PowerUser to which you want to link the tag that you will create.
3. View the tags that are currently linked to the document as described in [View Linked Tags](#).
4. Click **Manage Links**.
The **Manage Document Links** dialog box appears.
5. Click **New Tag**.
New tag data appears at the bottom of the linked tags list. You can add data to the tag in a later step.
6. When you are finished creating tags, click **Close**.
7. Select the new tag that you created and click **Go to Tag**.
8. Click **Edit**.
The property pages become editable.
9. Select or type information just as you would for a document.
10. Click **OK**.

Upload Files

A System Administrator might have configured your system to allow you to upload files to the Meridian Enterprise vault that are related to tags in the maintenance management system. When the files are uploaded, they are automatically linked to the selected tag. You can know whether the configuration has been done by an **Upload** button available in the toolbar on the **Related Documents** page.

If the file already exists in the vault, it will be uploaded with the name like *<OriginalFileName>* (1).

Use these steps for [PowerUser](#).

To upload files to the Meridian Enterprise vault:

1. On any view page, select the tag in the results list that you want to upload files for.
2. In the results pane toolbar, click **Upload**.

The **Add Document/Select Files** dialog box appears.

3. Click **Add**.

4. Select a file to upload.

5. Click **Open**.

The file name is added to the file list. Select a file and click **Remove** to remove it from the list.

6. Repeat step 3 to select all of the files you want to upload and then click **Next**.

The **Progress** dialog box appears while the files are uploaded, showing the results.

Folders

If the tags in a vault are organized in a folder structure that reflects a plant breakdown structure (PBS) and if the tags in each folder are typically related to the same document, it might be more efficient to manage the links between the tags and the document using the tags' parent folder. Meridian supports implicitly linking a document to all of the tags that reside in the same folder. This feature requires that the vault be properly configured by a System Administrator.

Meridian provides this functionality through a *main tag* that resides in any folder that contains other tags. You manually link the main tag to the document (that typically resides elsewhere in the vault) that you also want to be linked to the other tags that reside in the same folder with the main tag. The main tag acts in the place of the folder in the relationships with the tags. This is because references are not supported for folders in Meridian Enterprise. Then, when you add or remove tags from the folder, they are assumed by Meridian to also be linked to the document. No literal references exist between the normal tags and the document. It is only by the association of the normal tags with the parent folder that the references are implied.

The reverse is also possible. That is, linking a tag to all of the documents that reside in the same folder. This scenario is supported by the presence of a special *proxy document* in a folder that contains other documents. The proxy document does not necessarily need to be an actual document. For example, it can be a virtual document that is not actually part of the set of other documents in the same folder.

Working with main tags and proxy documents is described in the following topics.

Create And Link Proxy Documents

A proxy document represents its parent folder in relationships with asset tags. You can also think of the proxy document as representing all of the normal documents that are contained within the parent folder. Tags that you link to the proxy document are considered by Meridian to be linked to the parent folder and thereby to all of the normal documents that reside in that folder.

Create and Link a Proxy Document

Use these steps for [PowerUser](#).

To create and link a proxy document:

1. In the folder that you want to link to a set of tags, create a new document of the proxy document type.

Consult with a System Administrator if you do not know which document type to use. Create only one proxy document in any folder.

2. Link the proxy document to the tags that are related to all of the other documents that will reside in the same folder as the proxy document.

For more information on linking documents to tags, see [Link Tags To a Document](#).

The tags that are listed on the **Related Tags** page of the proxy document should also now appear on the **Related Tags** page of the parent folder. Every non-proxy document that resides in the folder (including new documents) will now be associated with the same set of tags as are linked to the proxy document. This is even though the **Related Tags** page does not appear for the normal documents. You can manage the links to the proxy document by clicking the **Manage Links** button on the **Related Tags** page of either the folder or the proxy document itself.

Locate Proxy Document for a Folder

Use these steps for [PowerUser](#).

To locate the proxy document for a specific folder:

1. In the **Explorer** view, select the folder for which you want to find its proxy document.
2. On the **Related Tags** property page, click **Go to Proxy Document**.

Focus shifts to the proxy document.

Main Tags

A System Administrator may have configured your vault to use main tags. A main tag is typically one tag within a folder that is considered the most important or that is the parent of the other tags. The precise definition of a main tag depends on the design of your environment. Consult a System Administrator if you do not know how main tags are used in your organization.

When a vault is configured to support main tags, besides being shown for the tags themselves, the **Where Used** property page is shown for the parent folder of the main tag. The page lists the documents to which the main tag is linked. You can click the **Go to Main Tag** button on the page to shift focus to the main tag. You can manage the document links of the main tag with the **Manage Links** button on the **Where Used** page of either the folder or the main tag itself. For more information about managing links, see [Link Tags To a Document](#) and [Link Documents To a Tag](#).

Build a Drawing Tags Report

Meridian can build a report in Microsoft Excel that lists the drawing tags that are linked to a selected document or vice versa.

You must have Microsoft Excel installed on your computer to build a report.

Build Report of Linked Tags

Use these steps for [PowerUser](#).

To build a report of linked tags:

1. View the **Tags** property page in PowerUser for the document upon which you want to build the report.
2. Select any row in the tags list.
The command buttons become enabled.
3. Select a report definition from the **Template** list.
The report definition must be configured by a System Administrator.
4. Click **Create**.
Microsoft Excel opens and the tag data appears in a new worksheet.
5. You may format, print, and save the worksheet to meet your needs.

Build Report of Linked Documents

Use these steps for [PowerUser](#).

To build a report of linked documents:

1. View the **Where Used** page for the tag upon which you want to build the report as described in [View Linked Documents](#).
2. Select any row in the documents list.
The command buttons become enabled.
3. Click **Report**.
Microsoft Excel opens and the document data appears in a new worksheet.
4. You may format, print, and save the worksheet to meet your needs.

Meridian Portal

Meridian Enterprise can be configured with special features that allow you to easily exchange documents with Meridian Portal. This integration supports two usage scenarios:

- [Changing documents in Meridian Portal.](#)

In this scenario, the Meridian Enterprise vault is simply an as-built repository for documents created and revised by external business partners and exchanged through Meridian Portal.

- [Changing documents in Meridian Enterprise.](#)

In this scenario, documents are created and revised in the Meridian Enterprise vault and delivered to external business partners through Meridian Portal.

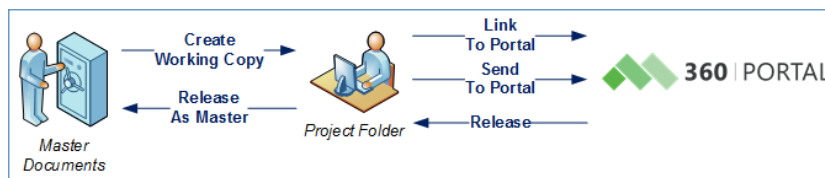
You can use the scenario that best matches your business process and needs. To learn how to configure this integration, see [Integrate Meridian Enterprise with Meridian Portal.](#)

Change Documents In Meridian Portal

In this usage scenario, master documents that reside in a Meridian Enterprise vault and that require revision by external business partners can be sent to Meridian Portal as illustrated in the following figure. This is done by creating working copies of the master documents and placing them in Meridian Enterprise project folders. These folders are linked automatically to corresponding Meridian Portal project repositories.

The working copies can then be sent (copied) to Meridian Portal where they can be downloaded by external business partners, revised, and uploaded back to the project repository along with new documents that are also part of the same project. The revisions and new documents can be checked for standards compliance, reviewed for technical accuracy, and then released back to the originating project folder in the Meridian Enterprise vault. From there, they can be released as new revisions of the master documents.

To learn how to configure the integration with Meridian Cloud, see *Integrate Meridian Enterprise with Meridian Portal* in the *Meridian Enterprise Administrator's Guide*.



These special features can be found in the PowerUser application and in PowerWeb.

Link Folders To Meridian Portal

You can link Meridian Enterprise folders to Meridian Portal projects in these ways:

- [Create Projects In Meridian Portal](#)
- Link existing folders created in Meridian Enterprise as described in this task

Meridian folders can be linked to a Meridian Portal project only when:

- The Meridian folder is a folder type that has its **Can be linked to Meridian Portal projects** option enabled in the vault configuration. To learn how to enable this setting, see *Create And Edit Folder Types* in the *Meridian Enterprise Configuration Guide*.

For information about your vault configuration, ask a System Administrator.

- Documents in the folder are not already linked to a different Meridian Portal folder.
- The Meridian Portal project that you want to link to is a **Standard Project** type project. **Packages Only** type projects cannot be linked to Meridian Enterprise.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

Link a Meridian Folder to a Meridian Portal Project

To link a Meridian folder to a Meridian Portal project:

1. Select the folder you want to link.
2. Choose between two options:
 - Right-click the folder then select **Folder > Link To Meridian Portal** in the context menu that appears.
 - In the **Folder** ribbon, in the **Action** group, click **Link To Meridian Portal**.

The **Meridian Portal Projects** dialog box appears and lists the available projects.

3. If you want to link to an existing project, select the project you want then click **OK**.
4. If you want to create a new Meridian Portal project:
 - a. Click **New Project**.

The **New Meridian Portal Project** dialog box appears with the **Project Number** and **Project Name** fields filled in with the **Project Name** from the vault.

- b. If required, edit the **Project Number** and **Project Name** fields for the new Meridian Portal project that you want to create.
5. Click **OK**.

The folder is linked to the project and the project name is shown on the property page of the folder with a hyperlink button that will open the project.

Unlink a Meridian Folder from a Meridian Portal Project

To unlink a Meridian folder from a Meridian Portal project:

1. Choose between two options:
 - Right-click the folder that you want to link, point to **Folder**, and then click **Unlink From Meridian Portal** on the shortcut menu that appears.
 - In the **Folder** ribbon, in the **Action** group, click **Unlink From Meridian Portal**.
A dialog box opens, asking you to confirm your choice.
2. Click **Yes**.
The folder is unlinked from the project.

PowerUser Procedures

To link a Meridian folder to a Meridian Portal project:

1. Right-click the folder that you want to link, point to **Master/Project Copy**, and then click **Link To Meridian Portal** on the shortcut menu that appears.
The **Meridian Portal Projects** dialog appears and lists the available projects.
2. Select the project to which you want to link and click **OK**.
A dialog box opens, asking you to confirm your choice.
3. Click **Yes**.
The folder is linked to the project and the project name is shown on the property page of the folder.

Send Documents To Meridian Portal

Meridian Portal provides a project type named **Standard Project** that supports a simple document revision workflow outside of the vault. This makes it possible for new revisions to be made by business partners without access to the Meridian vault.

You can easily send copies of vault documents to these projects through the Meridian Enterprise integration with Meridian Portal. When the revisions (and any new documents) are approved in Meridian Portal, they are automatically imported back into the vault.

Notes about Functionality

- This command requires a **Package export** type publishing job definition in Meridian Enterprise Server. For information about configuring publishing jobs, see *Configure a Publishing Job* in the *Meridian Enterprise Server Administrator's Guide*.
- When a document is sent to Meridian Portal:
 - 'For information', it is not locked.
 - 'For revision', it is locked.
- Documents sent to Meridian Portal remain locked to the export package in which they were sent until they are returned from Meridian Portal. If the package transfer fails, you can unlock the documents from the package as described in [Lock And Unlock Documents](#). Documents must be unlocked from PowerUser or from PowerWeb with a site cache configured and the **ActiveX compatibility mode** option disabled.
- When documents are imported back into the vault, they are subject to the Field-Path definition of the vault's configuration like any other document. This might place the documents in other folders than where they originated.
- Documents sent to Meridian Portal must first be synchronized to a Meridian Explorer repository. This will be done automatically, if necessary, but it might delay the documents' availability in Meridian Portal.
- If the **Existing documents** option of the import profile that is used to return documents from Meridian Portal to the vault is set to **New revision** and the source document is in a custom workflow but not in the **Released** state when the document is imported back to the vault, the import will fail. If this happens, change the state of the vault document to **Released** and restart the import job.
- The folder used in this task must be of a folder type that has its **Can be linked to Meridian Portal projects** option enabled. If you are unsure of the configuration of the folder types in your system, contact a System Administrator.

- To include a transmittal sheet with the package, ensure that you have your **Transmittal Document Type** configured. To learn how to configure a Transmittal Document Type, see the *Manage a Meridian Enterprise Vault* section in the *Meridian Enterprise Server Administrator's Guide*.

Prerequisites

Do the following prerequisite tasks:

1. If it does not exist already, create a folder in the vault to represent the Meridian Portal project as described in [Create a Folder](#).
2. Link the folder to a Meridian Portal project as described in [Link Folders To Meridian Portal](#).
3. If they do not exist already, create project copies of the master documents (and any required CAD references) into the folder as described in [Create a Project Copy](#).

PowerWeb Procedures

Use these steps for [PowerWeb](#).

If a document is created in PowerWeb and is sent to Portal, the document number and revision number generated in PowerWeb will also be used in Portal. The Document Range for these documents will be set to Automatic.

To send documents to Meridian Portal:

1. Select the project copies that you want to send.
2. In the **Workflow** ribbon, in the **Manage** group, click **Send to Portal**.

The **Send to Meridian Portal** dialog appears and lists the members of the Meridian Portal project that is linked to the vault project folder. The command is unavailable if no parent folder in the document path is linked to a Meridian Portal project.

3. Click options using the descriptions in the following table.
4. Click **OK**.

A dialog box shows the progress as the documents are sent to Meridian Portal in an export package and locked in the folder (if sent for the **Issue Reason** of **For Revision**). If you enabled the **Include CAD references** option, the referenced documents are sent also, even if they were not selected.

If the **Export Packages** property page is enabled in your system, it shows information about the export package in which the documents were sent. If the document already exists in the Meridian Portal project, the document is added as a new revision.

The package includes documents referenced by a reference belonging to a Reference Type configured with the option **Include to a Portal package**.

PowerUser Procedures

Use these steps for [PowerUser](#).

To send documents to Meridian Portal:

1. Select the project copies that you want to send.
2. Right-click over your selection, point to **Master/Project Copy**, and click **Send to Portal**.

The **Send to Meridian Portal** dialog appears and lists the members of the Meridian Portal project that is linked to the vault project folder.

3. Click options using the descriptions in the following table.
4. Click **OK**.

A dialog box shows the progress as the documents are sent to Meridian Portal in an export package and locked in the folder. If you enabled the **Include CAD references** option, the referenced documents are sent also, even if they were not selected.

If the **Export Packages** property page is enabled in your system, it shows information about the export package in which the documents were sent. If the document already exists in the Meridian Portal project, the document is added as a new revision.

Document Export Options

Document export options

Option	Description
Recipient	<p>Select the recipients that you want to work with the documents in Meridian Portal. You may select a recipient that has the Document Controller role or the special Project Document Control recipient that makes the package available to all users with the Document Controller role in the project. It will also cause the documents to skip the Acknowledge and Accept states of the workflow in Meridian Portal and go directly to the For Routing state. A notification email message will also be sent.</p> <p>This feature assumes that all document compliance checks have already been performed in Meridian such as if the Meridian user who is sending the documents is also the person who will receive them in Meridian Portal.</p> <p>If the recipient has the Contractor role:</p> <ol style="list-style-type: none"> 1. The recipient is notified by email, 2. A package of the documents is assigned to the recipient, and 3. The recipient can acknowledge receiving the package, which notifies the sender by email.

Option	Description
Package description	Type a description of the package for the recipient.
Include CAD references	<p>Also send any CAD reference documents to Meridian Portal that reside in the same project folder as the selected parent documents.</p> <p>In PowerWeb, when the user sends the document to Portal with CAD references for revision:</p> <ul style="list-style-type: none"> • editable reference documents are included for revision • non-editable reference documents are included for information <p>If the project copy has CAD references to documents outside the project, these referenced documents are included in the package for information.</p> <p>In PowerWeb, when the user sends the document to Portal with CAD references for information:</p> <ul style="list-style-type: none"> • reference documents are included for information
Purpose	<p>Select the purpose for sending the package:</p> <ul style="list-style-type: none"> • For revision — documents that are editable for the user are sent for revision and can be updated in Portal. All other documents are sent for information. • For information — all documents are sent for information to a project member with the Contractor role, and are read-only in Portal. Since the document is not a part of the workflow, it should not be sent to internal project members in Portal.
The latest released revision	When selected, the latest released revision of the document is sent to Meridian Portal instead of the working copy (default).

Send References for Information to Portal

The integration between PowerWeb and Portal has the option to [include CAD reference for information](#) when CAD drawings are sent to **Contractors**. This function is only available for MicroStation and AutoCAD references and does not apply to other CAD references, manual references, or asset references.

The preferred way to send AutoCAD and MicroStation references to **Contractors** in Portal is by using the option to [include CAD references for information](#). Using this method, the AutoCAD and MicroStation references are directly copied from the Master document and references for information don't need to be copied to a project.

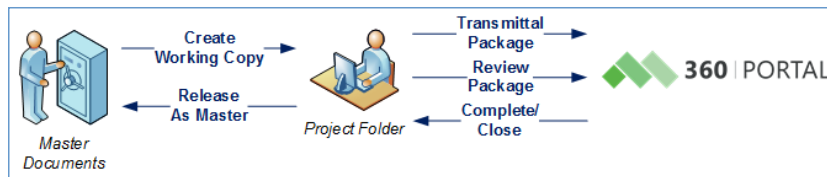
If reference documents also need to be updated by the **Contractor**, then you must [create a project copy](#) for the reference documents and [send](#) the copied reference documents to the **Contractor** with the purpose of **For Revision**.

You can also send other documents in a PowerWeb project to a **Contractor** for information. See also [send the documents as a package to Portal](#).

Change Documents In Meridian Enterprise

In this usage scenario, after documents are created or revised in Meridian, then they can be either sent to Meridian Portal in packages as transmittals or they can be exchanged bidirectionally in review packages as illustrated in the following figure.

In either case, the packages can only be sent to one specific project in Meridian Portal regardless of which project they originated from in Meridian Enterprise. These special features can be found in the PowerUser application and in PowerWeb.



When review packages are returned to Meridian Enterprise from Meridian Portal:

- If package documents (or only hybrid parts) were changed while they were in Meridian Portal, the source project documents are updated and the workflow status of the documents is set to **Review**. You may then review the changes to the documents and their properties.

If you accept the changes, the incoming revisions become the latest revision of the master documents from which they were copied. If the current revision in Meridian Enterprise is a PDF file, it will become the rendition of the revision.

- If package documents were not changed while they were in Meridian Portal, the source project documents are not updated and the workflow status of the documents is set to **Under Change**.

Create Projects In Meridian Portal

Creating a new project in Meridian Enterprise creates a new project folder in the vault to hold sub-folders and project documents. If it is integrated with Meridian Portal, it also automatically creates a corresponding Meridian Portal project where you can share the project packages and Quick Shares with others. To create a new Meridian Portal project without also creating a Meridian Enterprise vault folder, see [Create projects](#).

Use these steps for [PowerUser](#) and [PowerWeb](#).

To create a project:

1. In the navigation pane, right-click the parent folder where you want to create the new project folder.
2. Point to **New** and then point to **New Project**.
3. Click the name of the project type that has been configured to work with Meridian Portal.
If you are unsure of what type to choose, ask a System Administrator. The **Project** dialog box appears.
4. Click options or type values using the descriptions in the **Project properties** table below.
Required fields are indicated by the asterisk (*) character.
5. Click **Next**.
The **Meridian Portal** dialog box appears.
6. Click options or type values using the descriptions in the **Meridian Portal** table below.
7. Click **Finish**.
Your new project folder appears in the navigation view.

Project properties

Property	Description
Project ID	Type a number to assign to the project
Project Name	Type the name of the project

Meridian Portal options

Property	Description
Create Project	Enable this option to create a new Meridian Portal project with the information you entered.
Project Owner	Select a name from the list to be the owner of the Meridian Portal project.

Create Review Packages

A Meridian Portal review package is represented in Meridian Enterprise as a transmittal sheet (Microsoft Excel workbook) with Meridian Enterprise references to the other vault documents that are contained in the review package. The transmittal sheet also contains the document properties that accompany the documents to Meridian Portal.

The selected documents are linked to the transmittal sheet with references of the **refM360PackageReference** type. You can view these references and use them to navigate to the transmittal sheet as described in [View References](#). The documents are also placed under change by the **Meridian360** account in the workflow that is configured for the document type of each document.

Use these steps for [PowerUser](#) and [PowerWeb](#).

Create New Review Package

To create a new review package:

1. Select the documents that you want to add to a package.
2. Right-click your selection.
The shortcut menu appears.
3. Point to **Commands**, point **Meridian360**, and then click **Add to New Review Package**.
The **Add to New Review Package** dialog box appears.
4. Click options or type values using the descriptions in the following table.
5. Click **Finish**.

Package options

Group	Option	Description
Package	Type	The type of package.
Package	Name	The name of the package.
Package	Description	The description or instructions for the package recipients.
Package	Send out immediately	Sends the package immediately after you click Finish . Otherwise, the package is sent at the next scheduled interval.
Package	Notify Reviewers	Send an email notification to the members in the Reviewers list that the package has been sent.

Group	Option	Description
Package	Update transmittal on send	Updates the property values in the transmittal sheet to reflect the current values of the package documents, for example, revision numbers.
Details	Due date	Select a date when you expect a response from the recipient.
Details	Distribution code	Select a distribution code from the list. The Reviewers list refreshes to show the names of the reviewers that are assigned to the selected distribution code.
Details	Reviewers	The Meridian Portal project members that will be assigned to review the documents in the package.

Add Documents to Existing Review Package

To add documents to an existing review package:

1. Select the documents that you want to add to a package.
2. Right-click over your selection.
The shortcut menu appears.
3. Point to **Commands**, point to **Meridian360**, and then click **Add to Existing Review Package**.
The **Add to Existing Review Package** dialog box appears.
4. Select the name of the package from **Package Code** and then click **Finish**.

Create Packages

A Meridian Portal package is represented in Meridian Enterprise as a transmittal sheet (Microsoft Excel workbook) with Meridian Enterprise references to the other vault documents that are contained in the package. The transmittal sheet also contains the document properties that accompany the documents to Meridian Enterprise.

Use these steps for [PowerUser](#) and [PowerWeb](#).

Create a New Package

To create a new package:

1. Select the documents that you want to add to a package.
2. Right-click your selection.
The shortcut menu appears.
3. Point to **Commands**, point to **Meridian360**, and then click **Add to New Transmittal Package**.
The **Add to New Transmittal Package** dialog box appears.
4. Click options or type values using the descriptions in the following table.
5. Click **Finish**.

Package options

Group	Option	Description
Package	Type	The type of package.
Package	Name	The name of the package.
Package	Description	The description of the package.
Package	Send out immediately	Sends the package immediately after you click Finish . Otherwise, the package is sent at the next scheduled interval.
Package	Notify recipient	Sends an email message to the package recipients to alert them about the package.

Group	Option	Description
Package	Update transmittal on send	Updates the property values in the transmittal sheet to reflect the current values of the package documents. The Meridian Enterprise internal properties (for example, revision number) are not affected by this option and are always updated when transmittals are sent.
Details	Issue reason	Select a reason from the list for which you are issuing the package .
Details	Due date	Select a date when you expect a response from the recipient.
Details	Include source	Includes the document source files in the package.
Details	Include rendition	Includes the document rendition files in the package.
Details	Include transmittal sheet	Includes the transmittal sheet in the package.
Details	Send read-only	Locks the documents in the package from being overwritten by changes.
Details	Assign to	Select a recipient of the package from the list.
Details	Distribute to	Select a distribution list for the package from the list.

Add Documents to Existing Package

To add documents to an existing package:

1. Select the documents that you want to add to a package.
2. Right-click over your selection.
The shortcut menu appears.
3. Point to **Commands**, point to **Meridian360**, and then click **Add to Existing Transmittal Package**.

The **Add to Existing Transmittal Package** dialog box appears.

4. Select the name of the package from **Package Code** and then click **Finish**.

The selected documents are linked to the transmittal sheet with references of the **refM360PackageReference** type. You can view these references and use them to navigate to the transmittal sheet as described in [View References](#). The documents are also placed under change by the user **Meridian360** in the workflow that is configured for the document type of each document.

Send Packages

When you have finished adding documents to a package, you can send it to Meridian Portal where it can be downloaded by the package recipients.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To send a package:

1. Right-click the transmittal sheet for the package that you want to send.

The shortcut menu appears.

2. Point to **Document Workflow**, and then click **Send Out**.

The **Execute transition 'Send Out'** dialog box appears.

3. Click options or type values using the descriptions in the following table.

4. Click **Finish**.

The transmittal sheet and its linked documents (the package contents) are routed in a workflow to the **Meridian360** account and the **Status** is changed to **Sent Out**. You can view the workflow as described in [View the Current Workflow](#).

After a few minutes, the recipient of the package will receive an email notification that contains a link to the package in Meridian Portal. They can see the package as described in [View packages](#) and work with it like any other package.

Package options

Group	Option	Description
Package	Type	The type of package.
Package	Name	The name of the package.
Package	Description	The description of the package.
Package	Send out immediately	Sends the package immediately after you click Finish . Otherwise, the package is sent at the next scheduled interval.
Package	Notify recipient	Sends an email message to the package recipients to alert them about the package.
Package	Update transmittal on send	Updates the property values in the transmittal sheet to reflect the current values of the package documents, for example, revision numbers.

Group	Option	Description
Details	Issue reason	Select a reason from the list for which you are issuing the package.
Details	Due date	Select a date when you expect a response from the recipient.
Details	Package number	The unique identifier of the package.
Details	Include source	Includes the document source files in the package.
Details	Include rendition	Includes the document rendition files in the package.
Details	Include transmittal sheet	Includes the transmittal sheet in the package.
Details	Send read-only	Locks the documents in the package from being overwritten by changes.
Details	Assign to	Select the primary recipient from the list.
Details	Distribute to	Select additional recipients from the list. This option is available only if Send read-only is enabled.

Reject Packages

After a review package has been returned to Meridian Enterprise from Meridian Portal and you have reviewed the returned documents, you can reject the package if the documents are not correct.

You can see the response that the lead reviewer selected in Meridian Portal in the **Approval status** property on the **Details** page of the documents.

This performs several actions:

- Comments that were added on the **Remarks** page of the documents during review are added to the **Management Remarks** column in the transmittal sheet.
- The status of the documents in the package is set to **Rejected**.
- The status of the package in Meridian Enterprise and in Meridian Portal is set to **Rejected**.
- The package is reassigned to the recipient in Meridian Portal.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To reject a package:

1. Right-click the transmittal sheet that corresponds to the package that you want to reject.
The shortcut menu appears.
2. Point to **Document Workflow** and click **Reject**.
The package is rejected.

Update Transmittal Sheets

After you create a review package as described in [Create Review Packages](#), you might not send it immediately. If any document properties change before you send it that are shown on the transmittal sheet and if the **Update Transmittal on Send** option is disabled, the transmittal sheet might be inaccurate. You can update the transmittal sheet just before you send the transmittal so that it is accurate.

Note:

The Meridian Enterprise internal properties (for example, revision number) are not affected by the **Update Transmittal on Send** option and are always updated when transmittals are sent.

Use these steps for [PowerUser](#) and [PowerWeb](#).

To update a transmittal sheet:

1. Right-click the transmittal sheet that corresponds to the package that you want to send.
The shortcut menu appears.
2. Point to **Commands**, point to **Meridian 360** and click **Update Transmittal**.
The transmittal sheet is updated and its revision number incremented.

Briefcases

A *briefcase* is a file that you can use to transmit documents and selected property data to external parties as a single file. Briefcases are similar to popular archive files such as ZIP and RAR except that, in addition to containing other files, a briefcase file also contains metadata about the documents it contains.

Meridian has features that work with exclusively with briefcases to aid in creating revisions to documents remotely and then importing those revisions back into a vault. You can copy documents to a briefcase for reference purposes only, or you can check out and lock documents to a briefcase so that no one can work on these documents until they are unlocked.

A completed briefcase consists of a single file with the `.brc` extension. You can open a briefcase file using the Meridian **View Briefcase** command.

You can also create briefcases in open standard formats, such as ZIP or RAR, if the vault has been configured to make use of this feature. Such briefcases can be opened using the format's default application, such as WinZIP and WinRAR. Document metadata is stored in these briefcases in Excel, Access, or XML format, depending on the configuration of the briefcase template. Consult a System Administrator for information about the briefcase templates configured for your system.

Note:

Briefcases are not supported in PowerWeb. Consider using packages instead as described in [Packages](#).

View a Briefcase

Viewing a briefcase allows you to see:

- The documents contained within the briefcase
- The vault properties copied to the briefcase for each document
- The briefcase properties (size, date modified, password, comments, template, and document count)

Use these steps for [PowerUser](#).

To view a briefcase:

1. On the **Vault** menu, select **View Briefcase**.

The **Select Briefcase** dialog box appears, listing all known briefcases to which you have access. The properties of each briefcase are also displayed in columns.

2. Select a briefcase to view and click **Select**.

The briefcase opens in the **Briefcase** dialog from which you can perform all other briefcase actions.

Create a Briefcase

You can add documents to an existing briefcase or create a new one from a template configured by a System Administrator.

Consult with a System Administrator for the purposes of each briefcase template and the names of briefcase templates that are configured to use custom formats such as ZIP or RAR.


Create New Briefcase

Use these steps for [PowerUser](#).

To create a new, empty briefcase:

1. On the **Vault** menu, click **View Briefcase**.

The **Select Briefcase** dialog box appears.

2. Click the downward-pointing arrowhead button  next to the **Create Briefcase** button



A list of briefcase templates opens under the button.

3. Select a template from the list.

The **Create Briefcase** dialog box appears.

4. Select a destination folder, type the name of the new briefcase, and click **Create**.

The briefcase is created and you can now add documents to it.

Add Documents to Briefcase



Use these steps for [PowerUser](#).


To add documents to a new or existing briefcase:

1. Select the documents to add and then click **Add to Briefcase** on the **Document** menu. The **Select Briefcase** dialog box appears.

Note:

To add the entire contents of a folder to a briefcase, first select the folder and then click **Add to Briefcase** on the **Folder** menu.

- To add the documents to an existing briefcase:
 - a. Select the briefcase from the list and click **Select**.
The **Add to Briefcase** dialog box appears.
 - b. Select options using the descriptions in the following table and click **OK**.
The documents are added to the briefcase and the **Briefcase** dialog box appears, showing the current contents.
- To add the documents to a new briefcase:
 - a. Click the downward-pointing arrowhead button  next to the **Create Briefcase** button .
A list of briefcase templates opens under the button.
 - b. Select a template from the list.
The **Create Briefcase** dialog box appears.
 - c. Select a destination folder, type the name of the new briefcase, and click **Create**.
The **Add to Briefcase** dialog box appears.
 - d. Select options using the descriptions in the following table and click **OK**.
The documents are added to the briefcase and the **Briefcase** dialog box appears, showing the current contents.

2. If the briefcase uses a custom format, click the **Archive Briefcase** button  to save the contents of the briefcase in the custom format.

See the following table for descriptions of the buttons in the **Briefcase** window.

3. Choose between two options:
 - Click **Close** to close the briefcase without selecting a different document in the vault.
 - Select a document in the briefcase and click **Go to** to close the briefcase and automatically select the source document in the vault.

Add to Briefcase options















Option	Description
Check out and include current revision	The current revisions of the selected documents are locked to the briefcase. Documents in this state cannot be edited unless you unlock them with the correct security privileges or return them with the Import Briefcase command. An entry is added to the Comment document log to indicate the action taken.

Option	Description
Only include current revision	The current revisions of the selected documents are copied to the briefcase and are not locked. An entry is added to the Comment document log to indicate the action taken.
Only include last released revision	Only the last released revisions of documents are added to the briefcase. Documents in workflows are ignored.
Include CAD references	Copies CAD external reference files to the briefcase.
Include drawing and presentation files	Copies Autodesk Inventor drawing and presentation files to the briefcase.
Include custom references	Copies documents that use custom reference types to the briefcase.
Check out referenced documents	Checks out all referenced documents that are copied to the briefcase.
Include dependent support files	<p>Adds AutoCAD support files to the briefcase that the drawings in the briefcase are dependent upon for accurate display and plotting: <code>*.dst, *.ttf, *.fmp, *.ctb, *.stb, *.pc3, *.shx, *.shp</code>. These file types reside outside the vault and are installed with or created by AutoCAD. Only the support files for the default installation of AutoCAD are included. Different files may exist if multiple versions of AutoCAD are installed on your PC.</p> <p>The following support files are not included due to technical limitations: <code>*.dws, *.dwt</code>. The files are not included in the transmittal made for the briefcase as described in Create a Briefcase Transmittal Document. They should be manually excluded from import if the briefcase is imported into another vault.</p> <p>The path of each file (but not the drive letter or share name) is also stored in the briefcase so that the files can be easily extracted manually to the correct locations on the destination PC. Whether to extract the files and whether they are compatible with the destination installation of AutoCAD is the responsibility of the briefcase recipient. This option is only supported by briefcases in the open standard (<code>.zip, .rar</code>) formats, not in the <code>.brc</code> format.</p>
Content	Adds the document's native file to the briefcase.
Rendition	Adds the document's rendition file to the briefcase. To include any redlines of the rendition, also select Rendition redlines .
Thumbnail	Adds the document's thumbnail image to the briefcase.

Buttons in the Briefcase Window

The following table describes the purposes of the buttons in the **Briefcase** window.

Briefcase window buttons

Button	Description
	Select a briefcase to open.
	Display the properties of the briefcase, including its password, comments, template, and document quantity.
	Select documents to add to the briefcase.
	Delete selected documents from the briefcase.
	Open the selected documents in the viewer. Viewing some document formats (for example, Autodesk Inventor) in a briefcase might create lock files (*.lock) in the briefcase.
	Compare the selected document in the briefcase with the revision currently in the Meridian Enterprise vault.
	Display all of the vault properties of the selected document.
	Display which of the vault properties are included in the briefcase.
	Update the briefcase properties from the vault.
	Generates a transmittal sheet (report) listing the briefcase contents. The report is created in the briefcase and stored in the vault. The report can be configured to be updated if the contents of the briefcase changes. Consult a System Administrator for information on the configuration of transmittal reports.
	Saves the contents of the current briefcase in a standard archive format.
	Opens the default email program, allowing you to send a message with the briefcase as an attachment.
	Exports the database structure of a briefcase for use with other briefcase templates. Only supports Microsoft Access.
	Import the database structure from a database file. Only supports Microsoft Access.

Create a Briefcase Transmittal Document

A Meridian transmittal document is a Meridian report that contains information about the documents in a briefcase such as their names, revision numbers, comments, and so on. The report format is determined by a System Administrator. A transmittal can be included in a briefcase to help the recipient of the briefcase better understand its contents and a copy can be stored in the vault as a permanent record. The vault copy of the report is linked to the briefcase source documents by Meridian references.

Use these steps for [PowerUser](#).

To create a briefcase transmittal document:

1. On the **Vault** menu, click **View Briefcase**.
The **Select Briefcase** dialog box appears.
2. Select an existing briefcase for which you want to create the transmittal and click **Select**.
The **Briefcase** dialog box appears, showing the contents of the briefcase.

3. Click the **Generate transmittal** button .

The **Generate Transmittal Sheet** dialog box appears.


4. Select options using the descriptions in the following table.
5. Click **OK**.

The **Select Folder** dialog box appears.

6. Select a destination folder in the vault to store the new transmittal document.
7. Click **OK**.

What happens next depends on how the System Administrator has configured the briefcase template that was used to create the briefcase.

The transmittal document is generated from the report template that is assigned to the briefcase template from which the briefcase was created. If the briefcase template specifies a document type for the report that uses wizard pages for user input, those pages are displayed during report generation similar to any other document being added to the vault. The transmittal is then stored in the folder that you selected. If you selected the **Include transmittal in Briefcase** option, a copy of the transmittal is also placed in the briefcase.

8. You can view the transmittal document by selecting it in the briefcase and clicking the **View** button .

The transmittal opens in a new viewer window.

Briefcase transmittal options

Option	Description
Include transmittal in briefcase	Includes a copy of the transmittal document in the briefcase for the recipient's use. Enable Include transmittal in report if you want the transmittal report itself to appear as a row in the report as proof that it was included in the briefcase.
Save document list as collection	Saves the list of documents in the briefcase as a static collection. The lists your current static collections. If you select an existing collection, the documents are added to the collection. If you select the default <New collection> , you are prompted for a name for the new collection.

Import Documents From a Briefcase


Meridian allows you to import documents from an existing briefcase into a vault. This can be useful for importing documents provided by business partners or generated at remote sites.

Use these steps for [PowerUser](#).

To import from a briefcase:

1. On the **Vault** menu, click **Import from Briefcase**.

The **Select Briefcase** dialog box appears.

2. Select a briefcase from the list or click the **Open Briefcase** button  and browse to locate the briefcase you want to import.

The **Import from Briefcase** dialog displays the documents contained in the briefcase.

The documents are grouped by their change status as compared to the source documents in the vault. The various types of status are described in the following table.

3. To change the import action for any of the documents:
 - a. Right-click the document and point to **Change Action**.
 - b. Select a different action from the shortcut menu.
4. When you are satisfied with all of the actions to be performed, click **OK**.

The **Briefcase Template** dialog box appears.

5. Select the briefcase template that is configured with the property import mappings you want to use and click **OK**.

In most cases, you should choose the same template as the one from which the briefcase was made. You may choose other templates to import more or fewer properties. The documents in the briefcase are imported depending on the actions you chose. The **Import from Briefcase** dialog box appears.

6. Click options or type values using the descriptions in the following table.

If the briefcase contains any new documents, the **Select Folder** dialog will appear for each document so that you can choose a destination folder in the vault to store the new documents.

7. Select the appropriate folder and click **OK**.
8. If the document types of the new documents display any wizard pages, complete the pages and click **Finish**.

Briefcase status values

Status	Meaning
Not changed	The document has not changed since it was added to the briefcase. Importing the document is not necessary, so Do Nothing is the default for Action .
Properties Changed	One more properties of the document in the briefcase have changed since the document was added to the briefcase. The default for Action is Update , which will update the vault properties (but not the file) from the briefcase.
Documents Changed	The briefcase document has changed (is newer than the corresponding document in the vault) and should be checked in. Check In is the default for Action .
New Documents	The document was added to the briefcase from another vault or added by Accruent View. It should be added to the vault, so Import is the default for Action .

Briefcase import options

Option	Description
Use relative path	If selected, imports the documents to a folder in the vault that is relative to the active folder using the document paths stored in the briefcase. If not selected, imports the documents to an absolute path calculated from the root folder of the vault.
Sync properties from file	Synchronizes the vault properties from the imported documents after the import has finished.
Native	Imports the documents' native files from the briefcase.
Rendition	Imports the documents' rendition files from the briefcase. To include any redlines of the renditions, also select Rendition redlines .
Thumbnail	Imports the documents' thumbnail images from the briefcase.
Skip reference information	If selected, prevents resolving any references after the import has finished.

Property Values Of Imported Documents

When a new document is imported to a vault from a briefcase, the property information can come from several sources:

- The properties stored in the briefcase
- The values of title block attributes
- The wizard pages completed by the user when the new document was added

To make sure the property information is added correctly, the following order is used to add properties to new documents imported from a briefcase:

1. The properties stored in the briefcase are read first.
2. If so configured, the properties are synchronized from the document's title block attributes using the **Synchronize Properties from File** command. This overwrites any existing briefcase property values that have the same name.
3. The resulting property values are presented to the user as defaults in wizard pages. The user may choose to accept or override these values.

Note:

If a new document is added to a briefcase with Accruent View, imported into a vault, modified, and then checked out to the same briefcase, an odd situation arises. Meridian uses the **GlobalID** value of the Meridian system as part of the document ID that is stored in the briefcase. This allows documents to be moved between different Meridian systems and maintain their association with their source vault.

When a document is added to a briefcase using Accruent View, it has no such identifier. Hence in the situation described above, after the modified document is checked out again to the briefcase, the user will see *two* copies of the document.

The one shown with the status **New Document** is the original copy added by Accruent View and should be deleted from the briefcase because it does not contain the changes made to the copy in the vault. The correct revision to keep is the one checked out from Meridian. It will be listed with the **Checked Out** status.

Application Links

Meridian includes application links for the most popular applications used for engineering. The links can also be used in remote mode with PowerWeb.

Meridian integrates extensively with popular CAD applications. The CAD application links support powerful features such as automatic bidirectional title block data exchange, plotting sheet set support, external reference management, solid modeling assembly management, advanced viewing capabilities, and more.

Meridian also integrates well with the Microsoft Office family of products. You can store files created in any of the Office applications in a Meridian vault, even Outlook email messages and attachments, and view most of them without the need for the Office applications themselves or special viewers. Hyperlinks between Office documents are maintained throughout the document life cycle.

Notes about functionality

The application links are only available when they have been correctly installed on your computer. The links are installed by default if the linked application is already installed at the time that you install Meridian Enterprise on the PC. If you install the application after installing Meridian, the link will not be installed. You must then run the Meridian setup program and select the **Modify** option to install the link for the new application.

If you upgrade the linked application later (including updates to AutoCAD via the Communications Center) and a new version of the link is required to function correctly with the upgrade, you must also upgrade Meridian.

View References

When a document, the documents that reference it (parents), and all of the documents that it references (children) reside in the same vault, Meridian creates its own references that can be used to find and select related documents (an assembly) for processing with Meridian. The Meridian references can be viewed like any other Meridian reference with the following commands:

- **Show References** (children)
- **Show Assembly Structure** (parents and children)
- **Show Where Used** (parents)

For more information on using these commands, see [View References](#) and [Reference Explorer](#).

Application Links In Remote Mode


The Meridian Enterprise application links feature special support for working remotely. This remote mode can be useful when working with these applications on a WAN or from remote offices with modest network bandwidth. Remote application links require at least a full time Internet connection to the PowerWeb server and are not the same as working in Offline mode, which does not require a full time connection.

Note:

Using application links remotely is different than using remote session support to run the Meridian client applications with remote access software such as Windows Remote Desktop or Citrix Delivery Center. For remote application links, no third-party software is required. However, PowerWeb must be installed on a web server and you must have an active connection to it.

In remote mode, the links manage document metadata and references using the same protocol (HTTP) as PowerWeb together with document copies in your local workspace instead of from the vault. This mode requires less bandwidth to the Meridian server than when working normally in Online mode.

To enable Remote mode:

1. Right-click the **Accruent Application Integration** icon  in the system tray.
A shortcut menu appears.
2. Point to **Mode (Online)** and select **Remote**.

There are some limits to the kind of references that are supported by the application links in Remote mode:

- Documents that have been replaced (by the **Replace** command) are not detected.
- References are only resolved for documents that exist in local workspace.

AutoCAD Link

The Meridian application link for AutoCAD provides basic functionality for most of the discipline-specific editions of AutoCAD such as AutoCAD Land Desktop, AutoCAD Map 3D, and AutoCAD Architecture. Specific functionality is supported for other editions of AutoCAD such as AutoCAD Plant 3D, and AutoCAD Electrical.

Summary of Functionality

Basic link functionality includes:

- Title block (attribute) data exchange
- File property data exchange, including custom properties
- Sheet set references
- External reference file management
- Redline import to AutoCAD layers

Application-specific functionality includes:

- Project file management
- Assembly/subassembly/part structure management

The most important of these features are title block data exchange and external reference management because they can affect the integrity of your drawings. Some features, such as external reference file management, are automatic and don't require any action on your part. Other features, such as redline import, are activated at your discretion.

Title block data exchange between AutoCAD and Meridian occurs by a link between Meridian properties and AutoCAD attributes. If your drawing title blocks (static or dynamic) use attributes for the title block text, that text can be synchronized with properties in a Meridian vault. Normal AutoCAD text cannot be linked with Meridian. Meridian can support multiple title block standards simultaneously. Title block data exchange is configured by a System Administrator as described in *Configure Standard Title Block Synchronization* in the *Meridian Enterprise Configuration Guide*.

External reference file (X-Ref) management by Meridian entails automatically detecting and tracking AutoCAD X-Refs regardless of where the files may reside in a vault, including local workspace. This means that Meridian can maintain the referential integrity of X-Refs as you import drawings into a vault, move them, create revisions, and even exchange drawings with other parties using briefcases. When you open a drawing in AutoCAD that has X-Refs, the AutoCAD link finds the current location of the X-Ref files in the vault and updates the locations of the X-Refs in the drawing. The link will even detect if the X-Ref files have been renamed in the vault and will resolve them correctly in AutoCAD.

The AutoCAD link automatically creates and maintains Meridian references between drawings and their X-Refs (attached, overlaid, and underlaid). These links can be used to view X-Ref drawings that might be effected by changes to a parent drawing and for other uses.

Note:

OLE objects inserted into AutoCAD drawings (for example, Excel spreadsheets) are shown by the viewer. However, references between the documents are not automatically created by the AutoCAD link. You can create references manually as described in [Create References](#).

Together with the basic integration provided by Application Integration, any file created or used by AutoCAD can be managed in a Meridian vault. Conversely, AutoCAD commands that request a file can access Meridian vaults for document selection.

The functionality provided in AutoCAD by Application Integration is subject to the general limitations of Application Integration described in [Application Integration](#).

Enable Accruent Ribbon

The **Accruent** ribbon in AutoCAD is disabled upon startup and must be enabled manually.

To enable the Accruent ribbon:

1. Edit the following DWORD registry key.

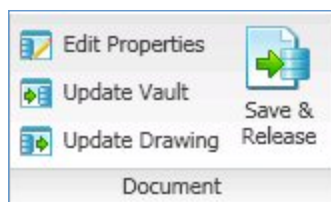
```
HKEY_LOCAL_MACHINE\SOFTWARE\Cyco\AutoManager  
Meridian\CurrentVersion\AutocadLink
```

2. Set the **TurnOnMenuBar** value to **1**.

Accruent Ribbon Display Modes

The commands for using the AutoCAD link features can be found in the **Document** group of the **Accruent** ribbon in AutoCAD. The **Accruent** ribbon in AutoCAD supports two display modes.

With rows as shown in the following figure.



Or without rows as shown in the following figure.



To configure the display mode:

1. Edit the following DWORD registry key.

```
HKEY_LOCAL_MACHINE\SOFTWARE\Cyco\AutoManager  
Meridian\CurrentVersion\AutocadLink
```

2. Choose between two options:

- Set the **UseRowRibbon** value to **1** to show the page with rows.
- Set the **UseRowRibbon** value to **0** to show the page without rows.

Edit Properties In AutoCAD

Synchronizing Meridian properties from title block attributes is an easy way to update some Meridian properties, but you may encounter circumstances where you want to edit Meridian properties that are not linked to a title block. Rather than opening a Meridian client application, you can edit properties without leaving AutoCAD.

Note:

If the properties that you want to edit are for an AutoCAD drawing that contains multiple layouts that represent separate drawing sheets, each with a title block, a special property page titled **Title Blocks** may be available if it is enabled by a System Administrator. This page lets you enter different values for the title block in each layout.

To edit properties from within AutoCAD:

1. On the **Meridian** menu or in the **Meridian** page of the ribbon in AutoCAD, select **Edit Properties**.

You may also type **AMMEDIT** at the AutoCAD command line. The Meridian property pages appear just as they would from within Meridian.

2. Click **Edit**.
3. Edit the properties.
4. Click **OK**.

The Meridian properties are updated.

Manage Redlines In AutoCAD

Electronic redlines created in Meridian can be imported into an AutoCAD drawing where they can be shown or hidden. They can be useful to guide drawing changes without the need to view the redlines in Meridian. When the redlines are no longer needed in AutoCAD, you can delete (hide) them or save them with the drawing as a record of the requested changes.

Note:

Only redlines created by the ICViewPlugIn viewer are supported by the AutoCAD link. Redlines created by the AutoVue viewer are not supported.

Import and Show Redlines

To import and show the redlines for a drawing:

1. Open a drawing that has existing Meridian redlines.
2. On the **Meridian** menu or in the **Meridian** page of the ribbon in AutoCAD, select **Show Redlines**.

You may also type **AMSHOWRED** at the AutoCAD command line. The redlines appear in the drawing.

Note:

Meridian redline memo objects cannot be shown inside AutoCAD.

Meridian redlines are imported to AutoCAD layers named **AMWREDL_<LayerName>** where **<LayerName>** is the name of the Meridian layer where the redlines were created. The Meridian layer names and colors are set in the vault configuration by a System Administrator. For example, the default redline layer name is **Exchange**, so the corresponding AutoCAD layer name is **AMWREDL_Exchange**. You can manipulate these layers by turning them on or off, freezing and thawing them, or locking and unlocking them the same as any other layer.

Meridian redline objects are created in AutoCAD using standard AutoCAD entities and as such can be edited like any other entities.

Hide Redlines

To hide the redlines in a drawing:

- On the **Meridian** menu or in the **Meridian** page of the ribbon in AutoCAD, select **Hide Redlines**.

You may also type **AMHIDERED** at the AutoCAD command line. The redlines disappear from the drawing.

When you hide Meridian redlines, the redline entities and redline layers are deleted from the drawing. To recreate the redlines, import them again.

Save And Release Drawings

After you have checked out a drawing as described in [Route a Document In a Workflow](#) and edited it, you can easily finish working with the drawing from within AutoCAD using the single command **Save & Release**.

The command performs several actions for you:

- Saves your changes to the file in your local workspace.
- Closes the drawing in AutoCAD.
- Synchronizes your local workspace with the Meridian vault.
- Routes the drawing to the released state of its workflow. If the next state in the drawing's workflow is not the released state, this action is not performed and you must route the document manually as described in [Route a Document In a Workflow](#).

To save and release a drawing:

- On the **Meridian** page of the ribbon in AutoCAD, select **Save & Release** .

If the workflow transition that executes is configured to show any property pages for you to input additional information, they appear just as they would from within PowerUser.

Note:

- This command is not available on the **Meridian** menu or at the command prompt because it attempts to close the drawing, which prevents releasing it.
- If the current drawing is the parent in an assembly and the **Releases the assembly document and all its references** option is enabled as described in [Actions Options](#), only the current drawing is released. The other documents in the assembly must be released manually, if necessary.

AutoCAD Sheet Sets

The AutoCAD link supports sheet sets created by the AutoCAD Sheet Set Manager. The AutoCAD link manages sheet sets similar to the way that it manages X-Refs. The application link creates and maintains Meridian references between the sheet set (DST) file and all AutoCAD drawing files referenced by the sheet set file. The link can also exchange Meridian property values in both directions between the sheet set document stored in the vault and the Sheet Set Manager. This is useful so that you can work with the same drawings in Meridian that are referenced by the sheet set. Storing the sheet set file as a document in a Meridian vault keeps it securely organized together with the drawings that it references.

The following topics describe how to use the AutoCAD link to work with sheet sets.

Create a Sheet Set

The best way to create a sheet set document in Meridian is to create it from a template in PowerUser. Consult a System Administrator for the names and purposes of the sheet set templates in your system.

To create a sheet set document:

1. On the **Vault** menu, point to **New**, point to the name of the sheet set document type, and select a sheet set template.

If the document type you selected has property pages associated with it, they will appear for you to type any known information.

2. Complete each property page.
3. Click **Next** or **Finish**.

The sheet set document is created in the current folder or in the folder calculated by the Field-Path definition of the vault configuration.

If the document type you selected performs automatic document naming, Meridian assigns a calculated name to the sheet set file. If not, a default document name is assigned that you may overwrite with any name you want.

When you open the sheet set document in AutoCAD, its properties can be updated from Meridian if they have been configured to do so by a System Administrator. Layouts can also be added to the sheet set in AutoCAD as described in [Add Layouts To a Sheet Set](#).

Add Layouts To a Sheet Set

To add layouts of vault drawings to an existing sheet set:

1. Open the sheet set in AutoCAD.

At least one drawing must also be open. If necessary, open or create a drawing to enable the **Import Layout as Sheet** command in **Sheet Set Manager**.

2. In **Sheet Set Manager**, click the **Sheet List** tab to display the **Sheets** list.
3. Right-click the name of the sheet set in the **Sheets** list and select **Import Layout as Sheet**.
The **Import Layouts as Sheets** dialog box appears.

4. Click **Browse for Drawings**.

The **Select Drawings** dialog box appears.

5. Click the **Browse the Meridian Enterprise Vault** button  in the toolbar.

The **'Select Drawing' from Meridian Enterprise** dialog box appears.

6. Browse the vault, select a drawing that contains a layout that you want to import, and click **Open**.

The name of the drawing, the names of the layouts found, and the status of the layouts are added to the layouts list.

7. Select the layouts that you want to import.
8. Repeat steps 4 through 7 for each drawing containing layouts that you want to import.
9. Click **Import Checked** when finished.

The layouts are added to the **Sheets** list.

When the sheet set is saved, Meridian references are created between the sheet set document and each drawing for which layouts were imported to the sheet set.

View References

When a document, the documents that reference it (parents), and all of the documents that it references (children) reside in the same vault, Meridian creates its own references that can be used to find and select related documents (an assembly) for processing with Meridian. The Meridian references can be viewed like any other Meridian reference with the following commands:

- **Show References** (children)
- **Show Assembly Structure** (parents and children)
- **Show Where Used** (parents)

For more information on using these commands, see [View References](#) and [Reference Explorer](#).

Route a Sheet Set

The Meridian sheet set references make it easy to initialize workflows for the drawings in a sheet set from within AutoCAD.

To route an entire sheet set:

1. Open the sheet set file in AutoCAD and open one of the drawings.
2. On the **Meridian** menu or in the **Meridian** page of the ribbon in AutoCAD, select **Route All**.
If the drawing is not currently checked out (in a writable state), you are prompted to confirm that you want to start the workflow.
3. Click **Yes** or click **Yes to All** to check out the entire sheet set.

The type of workflow initiated for the sheet set drawings depends on the configuration of their document types and your security privileges. The drawings might be routed in a Quick Change, a document type workflow, or a workflow definition. Consult with a System Administrator about the configuration of your system.

Synchronize Sheet Set Data

If you use Sheet Set Manager to manage the properties of sheet sets and some of those properties are also linked to Meridian properties, the AutoCAD link includes additional AutoCAD commands on the **Meridian** menu and in the **Meridian** page of the ribbon in AutoCAD that you can use to synchronize Meridian with the current sheet set properties.

Whenever the Sheet Set Manager is closed, the properties are synchronized automatically.

The following table lists the AutoCAD link commands for synchronizing data with Meridian properties.

Sheet set synchronization commands

Menu Item	Function
Update Project	Updates the sheet set open in AutoCAD with Meridian properties in the vault.
Update Vault	Updates Meridian properties in the vault from the sheet set open in AutoCAD.
Update References	Updates Meridian with the current sheet set references.

AutoCAD Plant 3D

The AutoCAD link provides specific functionality for use exclusively with AutoCAD Plant 3D. This functionality is in addition to the basic functionality provided for AutoCAD as described in [AutoCAD Link](#).

When a project file, related data files, and all drawing files that are referenced by the project file are stored in a Meridian vault, the link can retrieve Meridian property values from the AutoCAD Project Manager. This exchange is one way only, from AutoCAD to Meridian Enterprise. Data exchange to AutoCAD Plant 3D projects is not supported.

The link also creates and maintains Meridian references named **AcadPnID Project Part** between the project file and the related data files. The link creates references named **AcadPnID Project Reference** between the project file and the drawing files. This is useful so that you can work with the same sets of files in Meridian that are referenced by the project file.

If you are part of a team working on projects, contact a System Administrator about configuring the project folders in the vault as shared workspaces as described in *Configure Shared Workspaces* in the *Meridian Enterprise Configuration Guide*.

Prepare an AutoCAD Plant 3D Project

AutoCAD Plant 3D projects consist of a project file (.xml), drawing files (.dwg), and numerous data files (.xml, .dcf, .dcfx, and so on). The Meridian AutoCAD link refers to the data files as parts in the sense that they are parts of the project data other than the drawings. These parts should not be confused with Meridian hybrid document parts or mechanical assembly parts. Because of the complexity of AutoCAD Plant 3D projects, they require some initial preparation before you can start working with them in Meridian.

Configuration Notes

For full functionality, property synchronization should be configured as described in the *Configuring the AutoCAD Plant 3D link* article in the *Meridian Enterprise Configuration Guide*.

If AutoCAD Plant 3D is used with the Meridian Asset Management Module, the AutoCAD Plant 3D link that is included with that module should be used instead of the basic AutoCAD Plant 3D link. It provides functionality for linking AutoCAD Plant 3D drawing tags (not just the standard Asset Management Module tags) to Meridian documents and managing synchronization states.

To enable the AutoCAD Plant 3D link tag functionality, consult a System Administrator about setting the **AcadPnIDConfig** registry setting described in HKEY_CURRENT_USER\Software\Cyco\AutoManager Meridian\CurrentVersion\AutocadLink in the *Meridian Enterprise Administrator's Guide*.

Prepare a Project

To prepare a project:

1. Import the project with the Meridian **Assembly Import Wizard** as described in [Import Assemblies](#).
2. Create the file `MeridianLinkSearchRules.txt` in the project folder of the vault as described in the *Configuring project file synchronization* article in the *Meridian Enterprise Configuration Guide*.
3. In AutoCAD Plant 3D Project Manager, open the `project.xml` file from the Meridian vault.
Open any drawing to enable the **Accruent** ribbon.
4. In the **Meridian** ribbon, click **Attach Custom**.
The **Select documents description file** dialog box appears.

5. Navigate to and select the `MeridianLinkSearchRules.txt` file that you created in the vault.

The AutoCAD Plant 3D link creates a reference from the project file to the search rule file with the type **AcadPnID Custom Part**. It then uses the rules in the file to find the other files and to create references from the search rule file to them. If the search rule file is not locked, the link creates a **[Log]** section at the end of the file and a list of all of the files that were found and linked to the search rule file. You can view this list to confirm that all of the project files are correctly linked in Meridian.

6. Close the project.

Open a Project


You must manipulate the project files in Meridian before you can open the project in AutoCAD. How much you need to manipulate the files depends on the task that you want to perform with the files as described in the following table.

Project file management tasks

Task	Description
View project files	Prepare the project files by downloading them to your local workspace and synchronizing the paths in the files with their new locations.
Edit project files	Prepare the files as in the preceding task plus route the project files in a workflow so that your changes can be saved and synchronized with the vault.

Prepare Project Files for Viewing

To prepare project files to be opened for viewing:

1. In AutoCAD with the project file closed, in the **Accruent** ribbon, click **Prepare Project**.
The AutoCAD **Open** dialog box appears.
2. Click the vault button  in the toolbar.
The Meridian Enterprise Application Integration window appears, as described in [Application Integration](#).
3. Navigate the vault, select the project file, and click **Open**.
The project files are downloaded to your local workspace and the paths in the files are updated to their new locations.

Prepare Project Files for Editing

To prepare project files to be edited:

1. Prepare the files to be opened for viewing as in the preceding procedure.
2. In the **Accruent** ribbon, select **Route All**.

If the project files are not currently checked out to you (in a writable state), you are prompted to confirm that you want to start the workflow.

3. Click **Yes**.

The project files in the vault are checked out to you for editing and routed to the first writable state in their respective workflows.

4. If the project files were not initially in a writable workflow state, reopen the project in AutoCAD to make the properties editable.

Note:

- The first writable state of each workflow might not be the first available state in the workflow. Beginning the workflow at that state might violate your organization's business process. If so, route the files using the workflow transitions in the PowerUser instead, which do not skip any states.
- After you are finished editing a drawing, use the **Save & Release** command in the **Document** group of the **Accruent** ribbon as described in [Save And Release Drawings](#).

The type of workflow that is initiated for the project files depends on the configuration of their document types and your security privileges. The files might be routed in a Quick Change, a document type workflow, or a workflow definition. Consult with a System Administrator about the configuration of your system.

Synchronize Project Properties

If you use Project Manager to manage the properties of projects (including title blocks) and some of those properties are also linked to Meridian properties, the AutoCAD includes additional commands in the **Project Management** group of the **Accruent** ribbon in AutoCAD that you can use to synchronize Meridian with the current project properties and references. In this case, use those commands instead of the commands in the **Document** group of the **Accruent** ribbon in AutoCAD.

Whenever the Project Manager is closed, the properties are synchronized automatically.

The following table lists the AutoCAD link commands for synchronizing project properties and part references with Meridian properties and references.

Project property synchronization commands

Menu Item	Function
Update Project	Updates the project file open in AutoCAD with Meridian properties in the vault.
Sync to Vault	Updates Meridian properties in the vault from the project file open in AutoCAD.
Update References	Updates Meridian with the current project file references.

Upload a Project

If an AutoCAD project is closed while using the link in Remote mode as described in [Application Links In Remote Mode](#), the project files are not automatically synchronized with the vault as they normally would be in Online mode. To resolve this, you should synchronize the vault with your local workspace with the **Upload Project** command.

To upload a project:

- On the **Meridian** menu or in the **Accruent** group of the ribbon in AutoCAD, select **Upload Project**.

View References

When a document, the documents that reference it (parents), and all of the documents that it references (children) reside in the same vault, Meridian creates its own references that can be used to find and select related documents (an assembly) for processing with Meridian. The Meridian references can be viewed like any other Meridian reference with the following commands:

- **Show References** (children)
- **Show Assembly Structure** (parents and children)
- **Show Where Used** (parents)

For more information on using these commands, see [View References](#) and [Reference Explorer](#).

Create New Drawings

If the AutoCAD Plant 3D project for which you want to create a new drawing does not reside in a shared workspace, you do not have to do anything special to create new drawings. Create them as you normally would. For more information about shared workspaces, see [Shared Workspace Folders](#).

Special care must be taken when creating new drawings in a project that resides in a Meridian Enterprise vault. Due to a technical limitation in AutoCAD, when Meridian Enterprise calculates the filename for a new drawing, the filename cannot be sent to AutoCAD like it can be sent to other applications. This applies only to vaults that have been customized to show a wizard for new documents and that calculate the name using scripting. If you are unsure about the configuration of your vault, consult a System Administrator.

To create a new drawing:

1. Ensure that the folder structures in the AutoCAD Plant 3D project and in the vault are the same.
If necessary, synchronize the vault with the **Folder Structure** command in the Accruent ribbon.
2. Create the new drawing using the AutoCAD **New** command, not with Project Manager.
Do not select an AutoCAD Plant 3D drawing template.
3. Save the drawing in the appropriate location in the vault.
4. In AutoCAD Plant 3D Project Manager, invoke the **Copy drawing to the project** command on the folder menu.

Drawing Tags

A special link for AutoCAD Plant 3D can be configured to load in AutoCAD Plant 3D as described in *Configure the AutoCAD Plant 3D Link* in the *Meridian Enterprise Configuration Guide*. It makes additional commands available to you besides those in the base AutoCAD Plant 3D link. The synchronization commands are designed to work specifically with the drawing tags created by AutoCAD Plant 3D when they are linked to asset tags in the Meridian.

AutoCAD Plant 3D commands

Command	Description
Folder Structure	Creates missing sub-folders in the (local or shared) workspace location to match the folder structure of the project in the vault.
Tags Dialog	Opens the Tags dialog box so that you can view the status of the drawing tags as described in View Drawing Tags .
Update Drawing	Synchronizes the tags in the drawing from the corresponding asset tags in the vault. The tag properties must be mapped to Meridian Enterprise properties by a System Administrator.
Update Vault	Synchronizes the asset tags in the vault from the corresponding tags in the drawing. The tag properties must be mapped to Meridian Enterprise properties by a System Administrator.

AutoCAD Electrical

The AutoCAD link provides specific functionality for use exclusively with AutoCAD Electrical. This functionality is in addition to the basic functionality provided for AutoCAD as described in [AutoCAD Link](#).

Note:

AutoCAD Electrical projects consist of a project file (.wdp), drawing files (.dwg), and numerous data files (.wdl, .wdt, .wdn, .wdw, .ww1, and so on). The AutoCAD link refers to the data files as parts in the sense that they are parts of the project data other than the drawings. These parts should not be confused with Meridian hybrid parts or mechanical assembly parts.

When an AutoCAD Electrical project file and all drawing files referenced by the project file are stored in a Meridian vault, the link creates and maintains Meridian references named **AcadE Project Reference** between the AutoCAD Electrical project file and the related drawing files. The link also creates and maintains Meridian references named **AcadE Project Part** between the project file and the related data files. This is useful so that you can work with the same sets of files in Meridian that are referenced by the project file.

You can import AutoCAD Electrical projects using the Meridian **Assembly Import Wizard** as described in [Import Assemblies](#).

If you are part of a team working on AutoCAD Electrical projects, contact a System Administrator about configuring the project folders in the vault as shared workspaces as described in *Configure Shared Workspaces* in the *Meridian Enterprise Configuration Guide*.

Prepare an AutoCAD Electrical Project

An AutoCAD Electrical projects consist of a project file (.wpd) and drawing files (.dwg). Because of the complexity of AutoCAD Electrical projects, they require some initial preparation before you can start working with them in Meridian.

To prepare a project:

1. Choose between two options:
 - ([PowerUser](#) only) Import all of the project files to the vault as described in [Document Import Tool](#).
 - ([PowerWeb](#) only) Duplicate the project folder structure in the vault.
Import the contents of each project folder to the vault as described in [Upload Documents](#).
2. Release all the project files as described in [Route a Document In a Workflow](#).
3. Configure the main project folder as a shared workspace as described in *Configure Shared Workspaces* in the *Meridian Enterprise Configuration Guide*.
For guidelines on working in a shared workspace, see [Shared Workspace Folders](#).
4. Start all project files in a workflow as described in [Route a Document In a Workflow](#).
5. Open the project in AutoCAD Electrical to work on the project.

Open a Project


You must manipulate the project files in Meridian before you can open the project in AutoCAD. How much you need to manipulate the files depends on the task that you want to perform with the files as described in the following table.

Project file management tasks

Task	Description
View project files	Prepare the project files by downloading them to your local workspace and synchronizing the paths in the files with their new locations.
Edit project files	Prepare the files as in the preceding task plus route the project files in a workflow so that your changes can be saved and synchronized with the vault.

Prepare Project Files for Viewing

To prepare project files to be opened for viewing:

1. In AutoCAD with the project file closed, in the **Accruent** ribbon, click **Prepare Project**.
The AutoCAD **Open** dialog box appears.
2. Click the vault button  in the toolbar.
The Meridian Enterprise Application Integration window appears, as described in [Application Integration](#).
3. Navigate the vault, select the project file, and click **Open**.
The project files are downloaded to your local workspace and the paths in the files are updated to their new locations.

Prepare Project Files for Editing

To prepare project files to be edited:

1. Prepare the files to be opened for viewing as in the preceding procedure.
2. In the **Accruent** ribbon, select **Route All**.

If the project files are not currently checked out to you (in a writable state), you are prompted to confirm that you want to start the workflow.

3. Click **Yes**.

The project files in the vault are checked out to you for editing and routed to the first writable state in their respective workflows.

4. If the project files were not initially in a writable workflow state, reopen the project in AutoCAD to make the properties editable.

Note:

- The first writable state of each workflow might not be the first available state in the workflow. Beginning the workflow at that state might violate your organization's business process. If so, route the files using the workflow transitions in the PowerUser instead, which do not skip any states.
- After you are finished editing a drawing, use the **Save & Release** command in the **Document** group of the **Accruent** ribbon as described in [Save And Release Drawings](#).

The type of workflow that is initiated for the project files depends on the configuration of their document types and your security privileges. The files might be routed in a Quick Change, a document type workflow, or a workflow definition. Consult with a System Administrator about the configuration of your system.

Synchronize to Vault

When you make changes in AutoCAD Electrical, they are not automatically uploaded to your vault. You must use the **Synchronize to Vault** command.

To synchronize to the vault:

1. From the **Meridian** menu, select **Synchronize electrical project to vault**.
You are prompted to select which project file you want to synchronize.
2. Select the AutoCAD Electrical project you want to synchronize and click **Open**.
The project you selected is synchronized to the vault.

Update References

In AutoCAD Electrical, you can update your references from the project to the project parts. This function is required when you add a new drawing to your project because of the separation of the files in your file system. The **Update References** command will import the drawing to the vault and update the references.

To update references:

1. [Prepare your project files for editing.](#)
2. On the **Meridian** ribbon, click the down arrow below the **Project Management** button and select **Update References**.
3. Select the project you want to update.
4. Click **Open**.

The references are updated. If necessary, the drawing is added to your project in the vault.

View References

When a document, the documents that reference it (parents), and all of the documents that it references (children) reside in the same vault, Meridian creates its own references that can be used to find and select related documents (an assembly) for processing with Meridian. The Meridian references can be viewed like any other Meridian reference with the following commands:

- **Show References** (children)
- **Show Assembly Structure** (parents and children)
- **Show Where Used** (parents)

For more information on using these commands, see [View References](#) and [Reference Explorer](#).

Add a Drawing To a Project

Perform the following task to allow Meridian to manage the references correctly when adding existing drawings to a project.

The project must be properly initialized as described in [Prepare an AutoCAD Electrical Project](#).

To enable the synchronization commands in PowerWeb for AutoCAD Electrical project files, the WDP file extension must be added to value of **CADLinkExtensions** in the following registry key on the Meridian web server as described in *Registry Keys* section of the *Meridian Enterprise Administrator's Guide*.

```
HKEY_LOCAL_MACHINE\SOFTWARE\Cyco\AutoManager  
Meridian\CurrentVersion\WebLink
```

To add an existing drawing to a project:

1. Copy the drawing to the shared workspace folder.
2. In AutoCAD Electrical, add the drawing to the project.
3. Open the drawing for editing. This will import it to the vault automatically.
4. Synchronize the references from the project file (.wdp) as described in [Synchronize References](#).

AutoCAD Civil 3D

Meridian provides basic functionality for AutoCAD as described in [AutoCAD Link](#).

AutoCAD Civil 3D drawings can contain data shortcuts (.xml files). You can take advantage of the local workspace synchronization feature of Meridian to share your data shortcuts with other users who work on the same projects. The following topics describe how to do this.

If you are part of a team working on AutoCAD Civil 3D projects, contact a System Administrator about configuring the project folders in the vault as shared workspaces as described in *Configure Shared Workspaces* in the *Meridian Enterprise Configuration Guide*.

Prepare Your Local Workspace

Preparing your Meridian local workspace to work with an AutoCAD Civil 3D project involves the following steps.

- The **WorkspaceNoUserName** registry value in the following key must be set to 1 to prevent appending your user account name in the local workspace path:

```
HKEY_CURRENT_USER\Software\Cyco\AutoManager  
Meridian\CurrentVersion\Client\Settings
```


- The following settings can be configured to control working folder synchronization:
 - **Civil3DHideWCDialog** to automatically create working copies of data shortcuts and not prompt users to select them.
 - **Civil3DSyncWorkingFolder** to synchronize the entire working folder, not just the data shortcuts folder (default)
 - **Civil3DSyncType** to control automatic synchronization of the working folder
 - **ReleaseNewCivil3DDataShortcuts** to allow the release of Civil 3D data shortcuts from their workflows when they are imported to the vault by working folder synchronization

The following locations will be searched for these settings in the order listed and the value of the first location where it is found will be applied:

- HKEY_LOCAL_MACHINE\Software\Cyco\AutoManager
Meridian\CurrentVersion\AutocadLink (affects all users of the PC)
- HKEY_CURRENT_USER\Software\Cyco\AutoManager
Meridian\CurrentVersion\AutocadLink (affects only the current user of the PC)
- The **[Civil_3D]** section on the **AutoCAD** tab of the **Application Link Settings** in the **Environment** branch of the vault configuration (affects all users of the vault)

For more information about these settings, see the *Registry Keys* section in the *Meridian Enterprise Administrator's Guide*.

To prepare your local workspace:

1. Identify the folder in the vault that contains the project files that you want to work with or, if necessary, create a new folder as described in [Creating a folder](#).
2. Right-click the **Accruent Application Integration** icon  in the system tray, point to **Local Workspace**, and then click **Open Local Workspace Folder**.

The folder is opened in Windows Explorer. If the folder does not yet exist, open the vault and open any document from any project. This will automatically create the local workspace folders.

3. Open the sub-folder that corresponds to the vault that contains the project folder from step 1.

The vault name is part of the sub-folder name, which has the form
<ServerName>,<VaultName>.

4. Create a new folder there to synchronize with the project folder in the vault, for example, Civil 3D Projects.
5. In AutoCAD Civil 3D, set the working folder to the new local workspace folder that you created in step 4.
6. In AutoCAD Civil 3D, create a new data shortcut folder in the working folder that you set in step 5.

It should appear in the **Prospector** tree.

Data Shortcuts

How you work with data shortcuts in AutoCAD Civil 3D depends on whether you are the creator of the shortcut or the shortcut has already been created by another user.

Note:

Data shortcuts contain references to source drawings. The best practice is to keep those source drawings in the same data shortcuts folder that you created in [Prepare Your Local Workspace](#). This will guarantee that the source drawings will be synchronized to your local workspace with the data shortcuts. To help identify data shortcut files after they are imported to the vault, we recommend that a Meridian System Administrator create a dedicated document type for them that will be assigned to files with the .XML file extension as described in *Assign Document Types To Imported Documents* in the *Meridian Enterprise Configuration Guide*.

Work with Data Shortcuts

To work with data shortcuts:

1. Start AutoCAD Civil 3D and prepare a project folder as described in [Prepare Your Local Workspace](#).
2. If a data shortcut that you want to work with already exists in the **Prospector** tree and you open an existing drawing from there, you will be prompted to synchronize the data shortcuts to your local workspace. If you create a new drawing, you can synchronize them manually as described in the following task.

If the data shortcuts that you want to work with do not already exist, create new ones as necessary. This will first create the XML files in a new folder structure in your local workspace. These files and folders will be automatically copied to the vault project folder when you save or close the drawing and your local workspace is synchronized with the vault. The data shortcuts will be synchronized to the local workspaces of other users when they also configure their local workspaces as described in [Prepare Your Local Workspace](#) and open project drawings from the vault.

If you need to edit the data shortcuts:

- In the Accruent menu, click **Edit Data Shortcuts** to create working copies.

We recommend that a single user be responsible for modifications to the `ShortcutsFolders.xml` file that resides in the project folder and that it not be modified by multiple users.

Manually Synchronize Data Shortcuts

To manually synchronize data shortcuts:

- In AutoCAD Civil 3D, in the Accruent menu, click **Synchronize Data Shortcuts to Local** (local workspace) or **Synchronize Data Shortcuts to Vault**.

The **Synchronize Data Shortcuts to Vault** command only synchronizes new or modified shortcuts. To synchronize all shortcuts in legacy projects, use the **Synchronize All Data Shortcuts to Vault** command instead. The command is invisible by default.

To make it available, set the **AcadBaseConfig** registry value on the your PC as described in HKEY_CURRENT_USER\Software\Cyco\AutoManager Meridian\CurrentVersion\AutocadLink in the *Meridian Enterprise Administrator's Guide*. Depending on the quantity of shortcuts, this command can take considerably longer to complete than **Synchronize Data Shortcuts to Vault** and so it is not recommended for use in Remote mode.

Inventor Models

The AutoCAD VIEWBASE command can be used to insert a read-only view of an Inventor model into AutoCAD paper space. The Meridian AutoCAD link can automatically create Meridian references from the AutoCAD drawing to the Inventor project to show and help manage this dependency. For these references to be created, the Inventor model and the AutoCAD drawing must both reside in the vault before the model view can be inserted into the drawing.

After a reference has been made, the AutoCAD drawing can be opened as normal with these limitations:

- The Inventor model must be downloaded to your local workspace before the drawing is opened. When the drawing is opened, an unresolved reference error can occur. You can either click **Change the active project** and then select the Inventor project or you can click **Ignore unresolved references** and continue.
- If you rename or move the Inventor model, the reference will not be automatically updated, you must do it manually.

The Assembly Import tool does not support importing an AutoCAD drawing with references to an Inventor model that resides in the vault. After the drawing is imported, open the drawing in AutoCAD and save it. References to the Inventor model will then be created.

This functionality requires the setting **InventorRefSupport** be set to **1** in the vault configuration as described in *Configuring advanced settings* in the *Meridian Enterprise Configuration Guide*.

Drawing Tags

If your drawings contain tag IDs either as plain text or as AutoCAD attributes, Meridian can extract that information (if configured to do so by a System Administrator) and store it in the vault. The information is stored as a list of *drawing tags* for each document. The information can then be used to match with tags that also reside in the vault. You can link the matching tags to the document that contains the drawing tags or create new tags that are missing in the vault. Meridian can also generate graphical hotspots (in AutoCAD drawings only) for the drawing tags in the viewer window that you can click to navigate to linked tags in the vault. Specifying how drawing tag information is extracted and stored and how it relates to tags in the vault must be configured by a System Administrator as described in *Configure the AutoCAD Link* and *Configure the MicroStation Link* in the *Meridian Enterprise Configuration Guide*.

Meridian provides drawing tag management commands in AutoCAD and MicroStation that help when working with drawing tags in Meridian Enterprise. The commands are installed in AutoCAD and MicroStation when the Meridian components are selected during Meridian Enterprise installation on your computer.

Using each of the drawing tag management commands is described in the following topics.

View Drawing Tags

Viewing drawing tags is easy and is the first step before you can link the drawing tags to vault documents.

If revisions to tags are controlled by the management of change features of Meridian Enterprise, that is, changes must be made to a copy in a project, all master and project copies of the tags will appear in the **Tags** page so that you can see the all of the dependencies on the document.

To view the current drawing tag information for a document:

1. Choose between two options:

- In Meridian Enterprise:

- a. Select the document that contains tag information that you want to view.

For information on finding documents, see [Searches](#).

- b. View the tags that are currently linked to the document as described in [View Linked Tags](#).

- c. To view the drawing tags found as block attributes in a drawing, click **Drawing Tags**.

To view the tags found as plain text in other file types (if configured by a System Administrator), click **Text Tags**. The corresponding page or dialog box appears and shows the tags that are found in the document.

The **Drawing Tags** button is disabled in PowerWeb if the document is locked in the local workspace. This is because the document can be modified without detection by PowerWeb and invalidate the information shown by the dialog box.

- In AutoCAD and MicroStation:

- a. On the **Accruent** menu, select **Tags Dialog**.

The **Drawing Tags** dialog appears.

The following table contains descriptions of each column.

By default, a document's tag list is updated whenever the document is saved in AutoCAD or the **Text Tags** or **Drawing Tags** dialog is shown. To view updated **Status** information, such as after editing tag properties, click **Refresh**.

- b. To filter the list of tags on a specific value, select the value from the column heading's list.
- c. To see the equipment in the drawing that is associated with the selected tag data, click **Zoom**.

2. When you are finished viewing asset tags, click **Close**.

Tag columns

Column	Description
Tag Name	The text or attribute value found in current document by the last tag extraction. The value might have a prefix or postfix applied as configured by a System Administrator. Consult a System Administrator for the names of blocks and attributes or text patterns that are configured for asset tag extraction.
Tag Type	The tag type assigned to the asset.
Status	The status of the asset tag in relation to a matching vault tag. The possible values are described in the following table.
Inserted	Indicates an asset tag that was found in the current document.
Linked	Indicates that the current document is linked to the matching vault tag.
Tag	The name of a matching vault tag. These names are the same as the tags listed on the Related Tags property page.

The following table contains descriptions of the possible **Status** column values.

Status columns

Value	Description
No matching tag found	No matching vault tag could be found. To create and link a matching tag, see Create Vault Tags From Drawing Tags .
Not linked	A matching vault tag was found but the document has not yet been linked. To link the matching tag, see Link And Unlink Documents And Tags .
Mismatch found	A matching vault tag was found but the vault tag is not linked to the document and the tag type assigned to the vault tag does not match the asset tag type. To ignore the tag type comparison, disable Compare tag types (PowerUser) or enable Ignore tag types (PowerWeb). To correct the vault tag type, see View And Edit Vault Tag Properties .
Ok	A matching vault tag is linked to the document.
Coerced reference	A matching vault tag is linked to the document, but the tag type assigned to the vault tag does not match the asset tag type. To ignore the tag type comparison, disable Compare tag types (PowerUser) or enable Ignore tag types (PowerWeb). To correct the vault tag type, see View And Edit Vault Tag Properties .

Value	Description
Only in vault	A matching vault tag was found but the vault tag is not linked to the document and the tag type assigned to the vault tag does not match the asset tag type. To correct the vault tag type, see View And Edit Vault Tag Properties .

View And Edit Vault Tag Properties

After documents and tags have been linked as described in [Link And Unlink Documents And Tags](#), you can use drawing tags to identify and then view and edit the properties of the corresponding vault tags.

To view or edit the properties of a vault tag that is already linked to the current document:

1. Select the document that contains the tag information that you want to view.
2. Display the drawing tags as described in [View Drawing Tags](#).
3. Select a row that contains a vault tag that you want to view or edit.
4. Click **Properties**.

The property pages for the selected vault tag appear.

5. Click **Edit**.

The property pages become editable.

6. Modify the properties as you normally would.
7. Click **OK**.

Link And Unlink Documents And Tags

When the Meridian extracts drawing tag information, it searches the vault for matching tags. The tags that it finds might or might not be linked to the current document. They might be linked if the tag was created from the tag information as described in [Create Vault Tags From Drawing Tags](#) or they might be linked because another user performed the following procedure.

PowerWeb Procedures

Use these steps for [PowerWeb](#).

To link or unlink a document from tags that match drawing tags:

1. Select the document that contains the drawing tags that you want to use.
2. Display the drawing tags as described in [View Drawing Tags](#).
3. Place or remove a tick from the check box in the left column.
4. Click **Apply**.

The tags are linked or unlinked accordingly.

Click the icons in the header row to add or remove ticks from all of the tags in the list.

5. Click **Close**.

The list on the **Tags** page refreshes to show the resulting links.

PowerUser Procedures

Use these steps for [PowerUser](#).

To link or unlink a document from tags that match drawing tags:

1. Select the document that contains the drawing tags that you want to use.
2. Display the drawing tags as described in [View Drawing Tags](#).
3. Select the rows that contain matching tags that you want to link to or unlink from the current document.

In PowerUser you can easily select multiple rows:

- a. Hold down the **Ctrl** key and click to select individual documents.
- b. Select one row and then hold down the **Shift** key and click another row to select a range of rows.
- c. Click and drag your cursor across rows.

4. To link the selected tags, click **Link**.

The tags are linked to the selected document. The check box in the **Linked** column is selected to indicate that a link (Meridian Enterprise reference) has been created between the tag and the current document. The **Status** value of the asset tag displays **OK**.

5. To unlink the selected tags, click **Unlink**.

The tags are unlinked from the selected document. The check box in the **Linked** column is cleared to indicate that the links (Meridian Enterprise references) have been removed between the tags and the current document. The **Status** value of the asset tags display **Not linked**.

Update the Drawing Tag List

The Meridian Enterprise vault stores a drawing tag list for each drawing that contains attribute tags that are configured to use drawing tag integration. You can update a drawing's list from within PowerUser as described in [View Drawing Tags](#) or you can update the list from within AutoCAD and MicroStation. Updating the list from within AutoCAD and MicroStation ensures that the next user to view the drawing tags in Meridian Enterprise will immediately see all of the current tags and not have to refresh the list first (if the Meridian is configured to not update the list every time a drawing is saved).

To update a drawing's tag list:

1. With the drawing open in AutoCAD or MicroStation, on the **Accruent** menu, select **Update Tag List**.

The **Update Tag List** dialog shows the results.

2. Click **OK**.

Analyze Drawing Tags

Whenever drawing tag information is extracted from drawings, Meridian logs which tags have matching vault tags and which tags do not. You can display this information to confirm that the drawing tag integration is configured properly and that the tags contain the correct information.

To analyze a drawing's tags:

1. With the drawing open in AutoCAD or MicroStation, on the **Accruent** menu, select **Analyze Tags**.

The **Analyze Tags** dialog shows the results.

2. Click **OK**.

Create Vault Tags From Drawing Tags

If you want to link documents to tags in the vault that represent drawing tags in the document, the tags must exist first. Depending on its configuration, Meridian might create tags automatically from data in your maintenance management system. If not, you will need to create them manually. Meridian makes this relatively easy by using the information that is stored in the drawing tags.

To create vault tags from asset tags:

1. Select the document in PowerUser that contains the drawing tags for which you want to create vault tags.
2. Display the drawing tags as described in [View Drawing Tags](#).
3. Select the rows that contains the tags for which you want to create vault tags.

To select multiple rows:

- a. Hold down the **Ctrl** key and click to select individual tags.
 - b. Select one row and then hold down the **Shift** key and click another row to select a range of rows.
 - c. Click and drag your cursor across rows.
4. Click **New Tag**.

If the vault tag type is configured to show a property wizard for new tags, the wizard appears for the first new tag to be created.

5. Select or type the appropriate values in the property wizard.

If you selected multiple rows and you want the values to be applied to all of the new tags, select **Skip this wizard for all other objects of this type**.

6. If present, click **Next** and complete the remaining pages of the wizard.
7. When you are finished entering values on the last page of the wizard, click **Finish**.

A new tag is created using the property values that you typed in the wizard. The name of the new tag appears in the **Tag** column and the check box in the **Ref** column is selected to indicate that a link (Meridian Enterprise reference) has been created between the tag and the current document. The **Status** value of the asset tag displays **OK**.

If you selected **Skip this wizard for all other objects of this type**, new tags are created for each of the selected rows using identical property values that you typed in the wizard. If not, the wizard reappears for each new tag so that you can type values for that tag.

No further action is necessary to link the tags to the current document.

8. Click **Close**.

Update Drawing Tag Hotspots

A *hotspot* is an area in a document that can perform some action when the mouse cursor is moved into that area. Meridian can create graphical hotspots where blocks that represent plant equipment have been inserted in AutoCAD drawings. The blocks must contain an attribute that represents the equipment's physical tag. These hotspots can be shown in the PowerUser viewer window and users can click them to navigate to the vault tags that represent the asset.

The AutoCAD blocks for which you want to create hotspots must be configured correctly in the Meridian settings of the vault by a System Administrator as described in the *Configure Standard Title Block Synchronization* article in the *Meridian Enterprise Configuration Guide*.

Note:

Viewing hotspots requires that AutoVue be the active viewer for the selected document.

To update drawing tag hotspots:

1. Select the document in PowerUser that contains the drawing tags for which you want to update the hotspots.
For information on finding documents, see [Searches](#).
2. Display the drawing tags as described in [View Drawing Tags](#).
3. Click **Update Hotspots**.
4. Click **Close**.

MicroStation Link

The Meridian Enterprise application link for MicroStation provides the features of:

- Title block data exchange
- File property data exchange, including custom properties
- External reference management

The most important of these features are title block data exchange and external reference management because they can affect the integrity of your drawings. Some features, such as external reference management, are automatic and don't require any action on your part.

Title block data exchange between MicroStation and Meridian Enterprise occurs by a link between Meridian properties and MicroStation tagsets. If your drawing title blocks use tagsets for the title block text, that text can be synchronized with properties in a Meridian vault. Normal MicroStation text cannot be linked with Meridian. Meridian can support multiple title block standards simultaneously. Title block data exchange is configured by a System Administrator. The MicroStation Link can also exchange property data between Meridian and the file properties of drawings.

MicroStation reference management by Meridian entails automatically detecting, tracking, and updating MicroStation references regardless of where the files may reside in a vault, including local workspace. This means that Meridian can maintain the referential integrity of MicroStation references as you import drawings into a vault, move them, create revisions, and even exchange drawings with other parties using briefcases. When you open a drawing in MicroStation that has references, the MicroStation link finds the current location of the reference file in the vault and updates the location of the reference in the drawing. The link will even detect if the reference file has been renamed in the vault and resolve it correctly in MicroStation.

Together with the basic integration provided by Application Integration, any file created or used by MicroStation can be managed in a Meridian vault. Conversely, MicroStation commands that request a file can access Meridian vaults for document selection.

Note:

- The functionality provided in MicroStation by Application Integration is subject to the general limitations of Application Integration described in [Application Integration](#).
- To enable Application Integration in the MicroStation file dialog boxes, MicroStation must be configured to use the Windows versions of these dialog boxes as described in the MicroStation documentation.

The commands for using the MicroStation link features can be found on the **Accruent** menu in MicroStation. Some commands are also available within the PowerUser application. The following topics describe each feature.

Edit Properties In MicroStation

Synchronizing Meridian properties from title block tags is an easy way to update some Meridian properties, but you may encounter circumstances where you want to edit Meridian properties that are not linked to a title block or file properties. Rather than open a Meridian application, you can edit properties without leaving MicroStation.

To edit properties from within MicroStation:

1. On the **Meridian** menu in MicroStation, select **Properties**.

The Meridian property pages appear just as they would from within Meridian.

2. Click **Edit**.
3. Make your changes.
4. Click **OK**.

The Meridian properties are updated.

Autodesk Inventor Link

The Meridian Enterprise link for Autodesk Inventor provides the following features:

- Automatic management of file references.
- Automatic re-linking of replacement parts.
- The **Meridian Derive** command inside Autodesk Inventor.
- An add-in to Autodesk Inventor to exchange Meridian Enterprise properties to and from Autodesk Inventor iProperties from inside Autodesk Inventor.

The most important of these features are property data exchange and file reference management because they can affect the referential integrity of your assemblies. Some features, such as file reference management, are automatic and don't require any action on your part. Other features, such as the **Meridian Derive** command, are only activated at your discretion.

Property data exchange between Autodesk Inventor and Meridian Enterprise occurs by a link between Meridian Enterprise properties and Autodesk Inventor iProperties. If your drawing title blocks use iProperties for the title block text, that text can be synchronized with properties in a Meridian Enterprise vault (PowerUser client only). Normal Autodesk Inventor text cannot be linked with Meridian. iProperty data exchange is configured by a System Administrator as described in *Configure Autodesk Inventor Link Options* in the *Meridian Enterprise Configuration Guide*.

File reference management by Meridian Enterprise entails automatically detecting and tracking Autodesk Inventor references to related files regardless of where the files may reside in a vault, including local workspace. This means that Meridian Enterprise can maintain the referential integrity of files as you import assemblies into a vault, move them, create revisions, and even exchange files with other parties using briefcases. When you open an assembly in Autodesk Inventor that has file references, the Autodesk Inventor link finds the current location of the files in the vault and updates the locations of the files in the assembly. If you edit a part within the assembly, the link will place the part under change by you, if necessary. The link will even detect if the files have been renamed in the vault and will resolve them correctly in Autodesk Inventor.

The Autodesk Inventor link automatically creates and maintains Meridian Enterprise references between related Autodesk Inventor files. These links can be used to view the files that might be effected by changes to a related file and for other uses.

Together with the basic integration provided by Application Integration; assembly, part, parameter, finite element analysis, presentation, and drawing files created or used by Autodesk Inventor can be managed in a Meridian Enterprise vault. Conversely, Autodesk Inventor commands that request a file can access Meridian Enterprise vaults for document selection. For example, in an assembly, the Autodesk Inventor **Create Component** command lets you create local components in that assembly. With the Autodesk Inventor link installed, Meridian

intervenes and offers the Application Integration dialog to store the new component. If so configured, the wizard pages will appear just as if you were creating the document in PowerUser. The Field-Path definition may automatically determine the vault location of the new component.

Note:

The functionality provided in Autodesk Inventor by Application Integration is subject to the general limitations of Application Integration described in [Application Integration](#).

Some of the commands for using the Autodesk Inventor link can be found on the **Meridian** menu in Autodesk Inventor and some on the Accruent browser shortcut menu. Some commands are also available within the PowerUser application. The following topics describe each feature.

Link Options

The Autodesk Inventor link options control how the link behaves during actions that affect the document in the vault.

This option dialog box can also be shown by clicking the **Options** button in the Autodesk Inventor **Open** and **Save** dialogs.

Note:

These options can also be configured by a System Administrator in the Windows registry on your computer and may be unavailable for you to configure.

To set the link options:

1. In Autodesk Inventor, on the **Meridian** menu, select **Options**.
The **Options** dialog box appears.
2. Click options or type values using the descriptions in the following table.
3. Click **OK**.

Autodesk Inventor link options

Scenario	Option	Description
On document open	Activate BC browser	Shows the Accruent browser whenever a component is opened from a vault so that you can see the related components, their locations, and workflow status. In Inventor 2018, you must activate the Accruent browser manually by clicking the + icon at the top of the Inventor Browser.
On document open	Show file open options dialog	Shows the Autodesk Inventor File Open Options dialog when opening assemblies.
On document change	Show a message if the document is read-only	If an open component needs to be updated, shows a warning message if it is not checked out to you. Select one of the available options to control what action is performed for read-only components.
On document change	Use the Under Change state to modify the document	If an open component needs to be updated, it is first routed automatically to the Under Change state of the document type workflow that is assigned to the document type. If a workflow definition has been assigned to the document type, this option is cleared.

Scenario	Option	Description
On document save	Save or update DWF file	When an open component is saved, also creates or updates its rendition to reflect the current design of the component. Select For current document only or For all modified documents to specify which renditions to update. This option is relevant only if the vault is configured to generate renditions. Otherwise, this option is ignored. The update will be added to the Publisher queue and will be processed according to the publishing job that is assigned to the vault.
On document save	Show file save options dialog	Shows an Options button in the Inventor Save Copy As dialog when saving assemblies. You may click this button to show the Inventor File Save Options dialog.
On document save	No automatic upload	Disables automatic upload of your drawing when you save or close. If this setting is enabled, you must click the Upload Drawing button in the Link ribbon to upload your drawing to the vault.

Accruent Browser

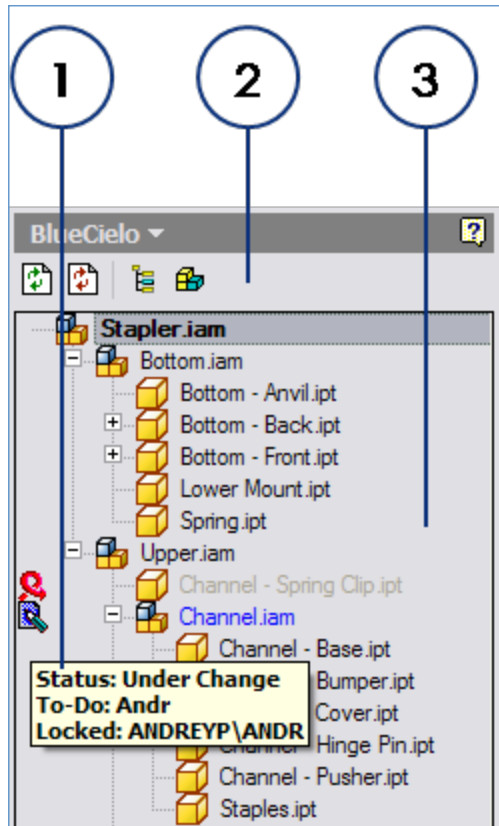
When the Autodesk Inventor link is installed, it adds a **Accruent** browser to the Autodesk Inventor browser panel. This gives you access to vault documents while working in Autodesk Inventor. You can use the **Accruent** browser to explore the structure of an assembly that is stored in a vault. The Autodesk Inventor browser menu then contains commands that let you switch between the **Accruent** browser and Autodesk Inventor's **Model** view.

Important!

While an assembly is open in Autodesk Inventor, it is possible for any user to change the Meridian properties of any part of the assembly that is unlocked in local workspace. This includes properties that may determine the location of the part in the vault, in effect, moving the part. In the **Accruent** browser in Autodesk Inventor, this will appear as if the part is not stored in the vault.





For this reason, you should only change properties that are included in the Field-Path definition of the vault with great care. For information about how the Field-Path definition is configured in your vault, consult a System Administrator.

When the **Accruent** browser is active, the vault status of the assembly, subassemblies, and parts are shown by icons in the leftmost column similar to the following figure that identifies the various areas of the browser. For descriptions of the status icons, see [Navigation View Icons](#).



The following table describes each area of the browser.

Features of the Accruent browser

Number	Name	Description
1	Tooltip	When the mouse cursor is hovered over a status icon, shows the current Status and To-Do Person of the file. When the mouse cursor is hovered over a document icon, shows the document name and vault path.
2	Toolbar	The browser toolbar button icons are described in the following list. <ul style="list-style-type: none">  Refresh — Refreshes the tree structure in the browser.  Rebuild — Rebuilds the model in the Model view. This can be useful when multiple people are working on an assembly at the same time.  Highlight in BC Browser — In the Model view, highlights the selected part or subassembly in the Accruent browser.  Highlight in Model View — In the Accruent browser, displays the selected document in the Model view.

Number	Name	Description
3	Assembly structure view	<p>Shows all related files that reside in the vault, their relationships to one another, and their current workflow status. For descriptions of the status icons, see Navigation View Icons.</p> <p>Right-clicking a document in the view shows the document shortcut menu described in Shortcut Menus.</p> <p>If files have not been added to the vault yet (that is, they only exist in the local workspace, or represent a part from Content Center that is placed on the local drive), they are shown in red, indicating that the files need to be imported to the vault.</p> <p>When Application Integration is in Remote mode, the shortcut menu that is shown in the Accruent browser does not support the Derive command.</p>

You can use the **Accruent** browser to drag and drop items into Autodesk Inventor. If you drop a file on the Autodesk Inventor title bar, the file will be opened. If you drop a file into the drawing pane, the file will be inserted into the assembly. The **Accruent** browser shows a shortcut menu that you can use to run common commands.

Note:

When Meridian Enterprise Application Integration is in Remote mode, the **Accruent** browser is not available. Likewise, when it is in Offline mode, the vault browser, **Accruent** toolbar, and **Meridian** menu are all unavailable.

Edit Properties In Autodesk Inventor

Synchronizing Meridian properties from title block properties (PowerUser client only) is an easy way to update some Meridian properties, but you may encounter circumstances where you want to edit Meridian properties that are not linked to an iProperty. Rather than opening a Meridian application, you can edit properties without leaving Autodesk Inventor.

To edit Meridian properties from within Autodesk Inventor:

1. On the **Meridian** menu in Autodesk Inventor, select **Properties**.

The Meridian property pages appear just as they would from within PowerUser.

2. Click **Edit**.
3. Edit the properties.
4. Click **OK**.

The Meridian properties are updated.

Rename Components Using Properties

The Autodesk Inventor link provides a command named **Rename Components** on the shortcut menu when an assembly is selected. You can use this command with a Meridian property to rename the components shown in the Autodesk Inventor **Model** pane. This can be useful if you want to see more meaningful names than the Autodesk Inventor file names.

The name may use the following syntax:

<Prefix><PropertyValue><Suffix>

This command is cleared unless the name elements have been configured by a System Administrator. The feature may also be configured to automatically rename components when they are either opened or saved. Consult a System Administrator for the name of the property and other details of how the naming standard is configured. The Meridian property that will be used in the names must already exist and contain non-empty values.

To rename the components of an assembly:

1. In the **Model** pane of Autodesk Inventor, right-click the assembly that you want to rename. The Autodesk Inventor link shortcut menu appears.
2. Select **Accruent Rename Components**.

All nodes in the selected assembly are renamed according to the configuration of the command.

Replace Components

If an assembly contains subassemblies or parts that do not reside in the vault, you can easily replace them with their vault equivalents. This can be useful to be sure the assembly uses the latest standard parts. The Autodesk Inventor link provides a command named **Get Accruent Replacement** on the shortcut menu in the Autodesk Inventor **Model** pane. The command is enabled when the selected component does not reside in the vault but a component with the same name does reside in the vault. You can use this command to swap the components in one step.

To replace a component with one from the vault:

1. In the **Model** pane of Autodesk Inventor, right-click the component that you want to replace.

The Autodesk Inventor link shortcut menu appears.

2. Select **Get Accruent Replacement**.

The selected component is replaced with the vault equivalent, using the same insertion point.

Meridian Derive Command

The **Meridian Derive** command is a feature of the Autodesk Inventor application link. The command is added to the shortcut menu of all parts and assemblies inside Autodesk Inventor. **Meridian Derive** allows you to create a new derived component on the fly and replace the existing occurrences of the source component with the newly derived component in the active model assembly.

For example, suppose that you want to make a new assembly that is exactly the same as an existing one but is longer. You can use the **Derive** command in Meridian Enterprise to copy the existing assembly to a new assembly that initially uses all subassemblies and parts of the original assembly. Then, you can open the new assembly in Autodesk Inventor and use **Meridian Derive** to create copies of the parts or subassemblies that will change. This also replaces any references to the original parts or assemblies with the new parts or assemblies.

Autodesk Inventor lets you derive a part or assembly from another base component using its **Derived Component** command. This clones a design so that changes to the base part are represented in the derived part. You can break the link between the base part and the derived part. The **Meridian Derive** command in Autodesk Inventor is very different from the Autodesk Inventor **Derived Component** command in that changes to the original part are *not* reflected in the derived part.

Manage Autodesk Inventor Iparts

Autodesk Inventor allows you to create a single part drawing called an iPart that can be used to generate a family of similar components. The general design of the part is the same but the sizes change from one family member to another.

We recommend that you store iParts in folders in a Meridian vault separate from other Autodesk Inventor documents (projects, standard parts, and so on) that use the iParts. To place an iPart into an assembly drawing that is managed by Meridian, select it from the vault using Application Integration. For an example of this folder structure, see the Mechanical vault that can be created from the Mechanical.met configuration file that is included with Meridian.

Display Iparts Variations In Reference Explorer

The Meridian **Show Assembly Structure** and **Show Where Used** commands display different views in the Meridian Reference Explorer. By default, the Meridian Reference Explorer shows the names of iParts and the sizes of the variations used in the assembly. In many cases, it is more convenient to show other information, such as the part number of the variation, instead of the size.

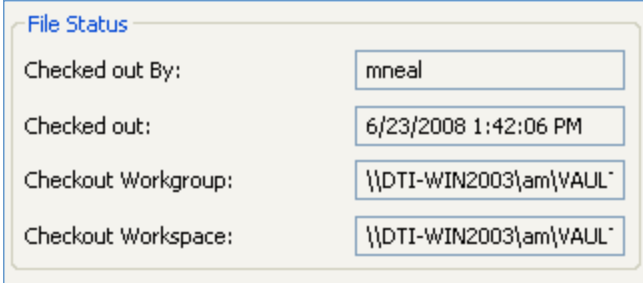
To display other iPart data in the Reference Explorer:

1. Create the iPart drawing in Autodesk Inventor as usual.
2. In the **Other** tab in iPart Author, add a new parameter that you want to display in the Meridian Reference Explorer, for example, **Part No.**
3. In the **Parameters** tab, type values in the table for the new parameter for all variations.
4. Right-click the new parameter column and select **File Name Column**.
5. Save the iPart.

When you place the iPart into an Autodesk Inventor assembly, choose which variant to use from the table. The new parameter will be shown in the Autodesk Inventor browser instead of the file name and various size values. The new parameter will also be shown in Meridian in the Reference Explorer as well as in other reference dialogs.

Resolve Checked Out Files

Under certain circumstances, documents may incorrectly appear checked out in Autodesk Inventor regardless of their correct Meridian workflow status. When documents are in this state, the **File Status** properties on the Autodesk Inventor **Status** page will appear similar to the following figure:



File Status	
Checked out By:	mneal
Checked out:	6/23/2008 1:42:06 PM
Checkout Workgroup:	\\DTI-WIN2003\am\VAUL
Checkout Workspace:	\\DTI-WIN2003\am\VAUL

If these properties are set, then you will not be able to save the documents in a single user project even if they are checked out to you.

Note:

The files can be saved in a shared project, but shared projects are being phased out by Autodesk, so we do not recommend using them.

This problem will also become apparent if you attempt to save the files. An error message may display or the **Save** dialog may display the status of documents as **Checked out to another user**.

To resolve this problem:

1. Open the file in Autodesk Inventor.
2. On the **File** menu, select **Save As**.
3. Select a location on your computer.
4. If a dialog box appears warning that the selected location is not in the active project, click **Yes** to continue.
5. Close the file in Autodesk Inventor.
6. Drag and drop the newly saved file from your computer onto the original file in the Meridian vault.

A shortcut menu will appear.

7. Select **Replace Document Content**.

The **File Status** properties will now be cleared and you can save the file as expected.

Autodesk Inventor Project Files

By default, Autodesk Inventor uses project files to organize the files that are referenced within a specified set of models. However, the document management features in the Meridian product suite minimize the need for using project files to several specific scenarios:

- When Pack and Go is used to export assemblies created by other users, and local workspace is enabled on the vault
- When Content Center components are stored in the vault

If neither situation applies, all Autodesk Inventor users should then select the **Default** project installed with Autodesk Inventor. If a project file must be used to support these scenarios, then all Autodesk Inventor users should utilize a single common project file that is placed in the root folder of the Meridian vault.

Important!

If you do not use a common project file, you may experience problems if you use **Pack and Go** when local workspace is enabled. This is because **Pack and Go** will try to resolve references to the last active reference, which may be in the local workspace folder of a different computer.

The common project file options must be configured as in the following table:

Autodesk Inventor project file options

Option	Description
Type	Single user
Workspace	. (period)
Old Versions To Keep On Save	0

Configure the Autodesk Inventor Project File To Use Content Center

When the Autodesk Inventor project file, the Meridian vault, and your local workspace have been configured correctly, all Content Center placements and references will automatically use the specified folder in either the central Meridian vault or your local workspace.

To configure Content Center for use with Meridian:

1. Create a folder in the Meridian vault specifically for storing the Autodesk Inventor Content Center components, for example, **Inventor Library Components**.
2. In Windows Explorer, navigate to your local workspace folder (`C:\BC-Workspace` is the default location).
3. Open the subfolder with your user name (for example, `C:\BC-Workspace\Joe Engineer`).
4. Open the sub-folder with the name of the server and vault name (for example, `C:\BC-Workspace\Joe Engineer\MeridianServer,D-EngVault`).
5. In this folder, create a subfolder with the same name as the folder created in the vault for Content Center storage (for example, `C:\BC-Workspace\Joe Engineer\MeridianServer,D-EngVault\Inventor Library Components`).
6. Open the common project file for editing.
7. Expand the **Folder Options** section.
8. Edit the **Content Center Files** option and select the folder that you created in your local workspace in step 5.
9. Save the changes to the project file.

The path will appear truncated because the local workspace location where you created the folder refers to the vault (for example, `.\Standards\Inventor Library Components`).

10. Synchronize your local workspace.

Note:

After making the common project file the default, all other Autodesk Inventor users of this configuration must synchronize their local workspace once to create the local folder.

Import Autodesk Inventor Files

Autodesk Inventor assemblies often have complex relationships with other Autodesk Inventor subassemblies and parts. Importing these relationships correctly requires special attention. Following are recommended guidelines for importing Autodesk Inventor files.

- Before you import Autodesk Inventor assemblies, resolve all subassemblies and part references first. There should not be any explicit references to local drive folders.
- There are two methods for importing Autodesk Inventor assemblies into Meridian: drag and drop, and the **Assembly Import Wizard** described in [Import Assemblies](#).
- When migrating Autodesk Inventor files between versions (for example, Autodesk Inventor 2008 to Autodesk Inventor 2009), the same fundamental principle applies: you must ensure the integrity of the assembly references first.

Manually open the assemblies in the new version of Autodesk Inventor and save them. This is fine for small quantities of assemblies and parts, but be aware that Autodesk Inventor can display warnings about property data not being stored due to related assemblies or parts not being migrated first. If you doubt that the data was saved, use the **Synchronize Properties to File** command to ensure that data stored in Meridian is synchronized to the Autodesk Inventor drawing.

Autodesk Inventor Dialogs

Some actions in Autodesk Inventor show Meridian application link dialogs instead of the default Autodesk Inventor dialogs because the action involves documents in Meridian. Some of the dialogs are explained here.

Update Replaced Documents Dialog Box

If the **Update Replaced Documents** dialog box appears when you open an assembly or subassembly, it means that your assembly contains references to part drawings that have been replaced by newer versions.

- To keep the reference to the old version (now retired in the vault), click **Cancel**.
A message will appear to remind you that you cannot edit retired parts.
- To update the reference to the newer version, click **Update**.
- To update only some references, clear the check boxes for the references you do not want to update, and then click **Update**.

This dialog also appears if you open a drawing view containing views of an assembly with replaced references that have not been updated.

Meridian Save Dialog Box

A **Meridian Save** dialog box appears when you save changes to an assembly file because Autodesk Inventor wants to write changes to the files that the assembly references. The dialog lists the files and their current vault status. The documents must be checked out to you to be able to save changes. Meridian filters out the documents that are either not under change by you or under change by another person, so that no errors will occur when Autodesk Inventor attempts to write to a document that you do not have the access to edit.

Note:

Depending on the revision methodology you use (document workflow or derived documents), changing a part may update all of the assemblies that reference it.

- Autodesk Inventor informs you that a referenced document is read-only.
- Another user attempts to edit a referenced document.

Meridian can also be configured to start a Quick Change when you need to check out components, to redraw title blocks when properties are synchronized, and to apply specific

document types to new library components. Learn more about these options in the *Configure Autodesk Inventor Link Options* article in the *Meridian Enterprise Configuration Guide*.

SolidWorks Link

The Meridian Enterprise application link for SolidWorks provides similar functionality to the other CAD application links:

- Property data exchange
- Assembly/subassembly/part structure management

These features are important because they can affect the data integrity of your drawings. Assembly structure management is automatic and doesn't require any action on your part. Property data exchange is also automatic or it can be activated at your discretion.

Besides these features, the SolidWorks link is unique in that it shows a Meridian vault browser inside SolidWorks that you can use to find and work with SolidWorks files that reside in a vault. For information about using this browser, see [Meridian Enterprise Browser](#).

Property data exchange between SolidWorks and Meridian occurs by a link between Meridian properties and SolidWorks properties (evaluated values). If your SolidWorks files contain properties that are used in title blocks, for example, that text can be synchronized with properties in a Meridian vault (PowerUser client only). Normal SolidWorks text cannot be linked with Meridian. Meridian can support multiple property sets simultaneously. Property data exchange is configured by a System Administrator and described in *Configure SolidWorks Property Synchronization* in the *Meridian Enterprise Configuration Guide*.

Assembly/subassembly/part management by Meridian Enterprise entails automatically detecting and tracking SolidWorks files regardless of where the files may reside in a vault, including local workspace. This means that Meridian can maintain the referential integrity of SolidWorks files as you import them into a vault, move them, create revisions, and even exchange them with other parties using briefcases. When you open a file in SolidWorks that has references to other files, the SolidWorks link finds the current location of the reference files in the vault and updates the locations of the reference files in the current file. The link will even detect if the reference files have been renamed in the vault and will resolve them correctly in SolidWorks.

The SolidWorks link automatically creates and maintains Meridian references between assemblies, subassemblies, and parts. These links can be used to view files that might be effected by changes to a different file and for other uses.

Together with the basic integration provided by Application Integration, any file created or used by SolidWorks can be managed in a Meridian vault. Conversely, SolidWorks commands that request a file can access Meridian vaults for document selection.

The commands for using the SolidWorks link features can be found on the **Meridian** menu and in the **Accruent** toolbar in SolidWorks. Some commands are also available within the PowerUser application.

- The easiest way to correctly import SolidWorks assemblies while maintaining their references is described in [Import Assemblies](#).
- For viewing SolidWorks files in PowerUser, we recommend that you install the SolidWorks eDrawings viewer on your computer and set it as the default viewer for SolidWorks files as described in [Change Viewers](#).
- For the best performance when loading SolidWorks assemblies, enable the SolidWorks **Performance** option **Automatically load components lightweight**.
By default, the option is disabled.
- If you work on SolidWorks models with PowerWeb in Remote mode, consider setting the **ReadOnlyReferences** registry value to improve the performance of saving assemblies with read-only sub-assemblies or parts. The value is described in HKEY_CURRENT_USER\Software\Cyco\AutoManager Meridian\CurrentVersion\AmSldWorksEx\Settings in the *Meridian Enterprise Administrator's Guide*.

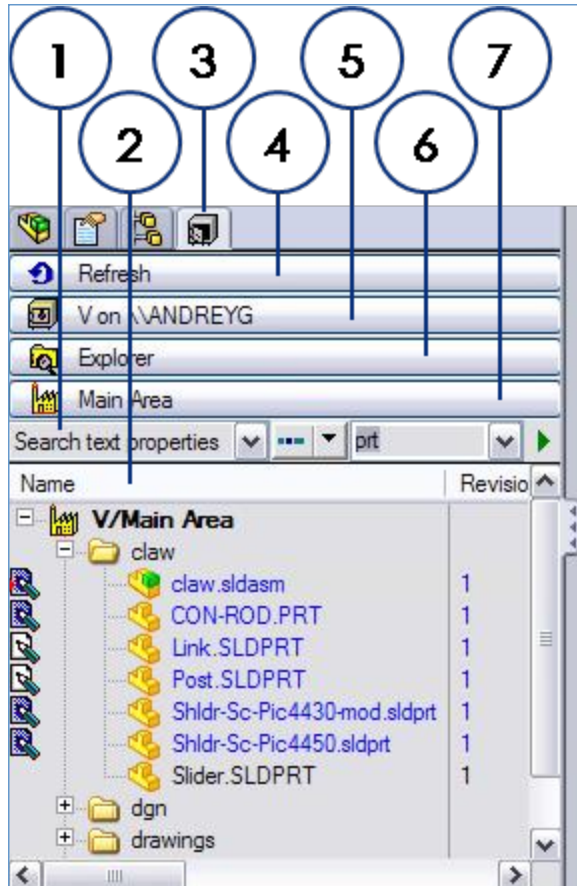
Note:

- SolidWorks note annotations that are linked to SolidWorks properties will also show the value of Meridian properties if the properties are mapped to one another. However, this synchronization is only in one direction from the SolidWorks property to the annotation. Manual changes to the annotation will not be synchronized to the Meridian property.
- Property and reference synchronization does not work in SolidWorks lightweight mode because external references are not resolved by SolidWorks.
- The functionality provided in SolidWorks by Application Integration is subject to the general limitations of Application Integration described in [Application Integration](#).
- Do not copy references in PowerUser while any of the files to which the references refer are open in SolidWorks. The references might not be updated correctly due to the files being held open by SolidWorks. For more information about copying references and the configurable options, see [Duplicate References](#).
- Meridian uses SolidWorks itself to update properties. Because Meridian will start and close SolidWorks for each document, this will add a significant delay to actions that involve multiple documents, for example releasing an entire assembly. To improve performance significantly, simply launch SolidWorks and keep it running in the background before starting the action.

The following topics describe each feature.

Meridian Enterprise Browser

When the Meridian Enterprise application link for SolidWorks is installed on your computer, the Meridian browser appears in SolidWorks similar to the following figure that identifies the various areas of the browser.



The following table describes each area of the browser.

Features of the Meridian Enterprise browser

Number	Name	Description
1	Quick Find bar	Use to search the currently open vault for documents. The results of the search will appear in the Navigation view (2). This toolbar works similar to the Quick Find toolbar as described in Quick Find .

Number	Name	Description
2	Navigation view	<p>One of the defined views of the vault contents. These are the same views that are shown as described in Navigation Views.</p> <p>To select another view, click the Navigation view button (6).</p> <p>Right-clicking a document in the view shows the document shortcut menu described in Shortcut Menus. For descriptions of the status icons, see Navigation View Icons.</p>
3	Meridian browser tab	When a different browser is visible, click this tab to show the Meridian browser.
4	Refresh button	Refreshes the current view to show recent changes.
5	Vault button	Click to open a different vault.
6	Navigation view button	Click to open a different Navigation view (2).

You can use the Meridian browser to drag and drop items into SolidWorks. If you drop a file on the SolidWorks title bar, the file will be opened. If you drop a file into the drawing pane, the file will be inserted into the assembly.

Note:

When Meridian Application Integration is in **Remote** mode, the Meridian vault browser is not available. Likewise, when it is in **Offline** mode, the vault browser, **Accruent** toolbar, and **Meridian** menu are all unavailable.

Edit Properties In SolidWorks

Synchronizing Meridian properties from SolidWorks properties is an easy way to update some Meridian properties, but you may encounter circumstances where you want to edit Meridian properties that are not linked to file properties. Rather than open a Meridian application, you can edit properties without leaving SolidWorks.

To edit properties from within SolidWorks:

1. On the **Meridian** menu in SolidWorks, select **Properties**.

The Meridian property pages appear just as they would from within Meridian.

2. Click **Edit**.
3. Make your changes.
4. Click **OK**.

The Meridian properties are updated.

Revit Link

The Meridian Enterprise application link for Autodesk Revit supports all of the Revit editions: Architecture, MEP, and Structure. The link provides:

- Meridian Enterprise property editing
- Title block data exchange (PowerUser client only)
- File property data exchange, including custom properties
- Automatic presentation file generation and import
- Automatic vault import of files exported by Revit
- Worksharing
- External reference management

Note:

Resolving modified references requires read/write access. The model cannot be under change by any user. Reference resolution is not supported for models that are transmitted and workshared.

Property data exchange between Revit and Meridian Enterprise occurs by a link between Meridian Enterprise properties and Revit properties. If your drawing title blocks use properties for the title block text, that text can be synchronized with properties in a Meridian Enterprise vault. Normal Revit text cannot be linked with Meridian.

Meridian Enterprise supports a limited set of Revit properties:

- ProjectIssueDate
- ProjectStatus
- ClientName
- ProjectAddress
- ProjectName
- ProjectNumber

Property data exchange and worksharing is configured by a System Administrator as described in *Configure Revit property synchronization* and *Configure Revit Worksharing* in the *Meridian Enterprise Configuration Guide* .

Together with the basic integration provided by Application Integration, any file created or used by Revit can be managed in a Meridian Enterprise vault. Conversely, Revit commands that request a file can access Meridian Enterprise vaults for document selection.

Note:

- The functionality provided in Revit by Application Integration is subject to the general limitations of Application Integration described in [Application Integration](#).
- Meridian uses Revit itself to update properties. Because Meridian will start and close Revit for each document, this will add a significant delay to actions that involve multiple documents, for example releasing an entire assembly. To improve performance significantly, simply launch Revit and keep it running in the background before starting the action.

If you are part of a team working on Revit projects, contact a System Administrator about configuring the project folders in the vault as shared workspaces as described in *Configure Shared Workspaces* in the *Meridian Enterprise Configuration Guide*.

The commands for using the Revit link features can be found in the **Accruent** group of the **Add-Ins** menu in Revit. Some commands are also available within the PowerUser application. The following topics describe each feature.

Edit Properties In Revit

Synchronizing Meridian properties from Revit properties is an easy way to update some Meridian properties, but you may encounter circumstances where you want to edit Meridian properties that are not linked to Revit properties. Rather than open a Meridian application, you can edit the properties without leaving Revit.

Note:

If the properties that you want to edit are for a Revit drawing that contains multiple sheets, each with a title block, a special property page titled **Title Blocks** may be available if it is enabled by a System Administrator. This page lets you enter different values for the title block in each sheet.

To edit properties from within Revit:

1. In the **Accruent** group of the **Add-Ins** menu in Revit, select **Properties**.
The Meridian property pages appear just as they would from within Meridian.
2. Click **Edit**.
3. Make your changes.
4. Click **OK**.
The Meridian properties are updated.

Export To the Vault

The Revit link integrates with the Revit **Export** command to easily import the exported files to the vault. The link automatically stores the files as new documents. If the current model is a project copy, the imported documents are linked to the master building model. This makes the building model easier to view since most of the exported file types are supported by the viewer, but Revit building model files are not supported.

To export a model to the vault:

1. In Revit, open the building model that you want to export.
2. Run the Revit **Export** command as normal and select the destination vault folder.

The exported files are imported automatically.

Create a Presentation Document

The Revit link provides a command for conveniently creating a presentation document (.dwf file) for the current building model. The link automatically stores the document as a hybrid part of the current model. This makes the presentation easy to find and associates it with the same property values as the building model from which it was made. It also makes the building model easier to view since .dwf files are supported by the viewer, but Revit building model files are not supported.

Note:

For the presentation to be attached correctly, the document type that is assigned to building model files must be configured properly by a System Administrator as described in *Configure the Revit Document Type* in the *Meridian Enterprise Configuration Guide*.

To create a presentation document:

1. In Revit, open the building model for which you want to create the presentation file.
2. In the **Accruent** group of the **Add-Ins** menu in Revit, select **Create Presentation**.

A presentation file is generated for you automatically from the current view and attached to the open building model document in the vault.

Worksharing

The Revit link supports worksharing by detecting when a local copy of a model is synchronized with the central file in a vault. During synchronization, the link can behave differently depending on how it is configured by a System Administrator.

The link can:

- Check the central file out to you in either the **Quick Change** or the **Under Change** workflow state. You might be prompted to accept or decline the routing.
- Check the central file out to a virtual user (for example, **Design Team**) in either the **Quick Change** or the **Under Change** workflow state.
- Release the central file automatically after synchronization has finished.

In vaults created by Meridian Enterprise 2017 and prior, one user must click the **Release Shared Central** button in Revit. Vaults created by Meridian Enterprise 2018 and higher do not have this requirement and the command is not available.

- Update Meridian properties of the central file with synchronization information such as the names of editable worksets, synchronization date and time, reload date and time.
- Maintain a Meridian Enterprise reference between the local copy and the central file.

After synchronization, you can easily clean up your local workspace of Revit backup files by clicking **Remove backup files**.

For details about how the Revit link is configured in your system, consult a System Administrator.

Sheet Sets

The Revit link can be configured by a System Administrator to automatically import sheet sets when they are exported from Revit. It can also be configured to create a Meridian reference between each sheet set file and the model from which it was exported. If those references are created and there are also external references between the sheet set files themselves, Meridian references will also be created for them. These references can be useful for finding all of the documents in a sheet set and navigating among them as described in [View References](#).

For details about how the Revit link is configured in your system, consult a System Administrator.

Limitations

This feature has the following limitations:

- If exporting the sheet set results in multiple files, the last file in the set is not imported automatically and must be imported manually. This is due to a defect in the Revit API and might be resolved in a future release.
- If exporting the sheet set will result in multiple files, Meridian will create a temporary empty document with the name that is specified in the Revit **Save** dialog box as the prefix of the exported files. If the document type that is assigned to this file is configured to show wizard pages, they will appear but can be ignored. The temporary document will be automatically revoked after the export has completed.
- Before re-exporting the same sheet set, you must place all existing documents in the sheet set under change in a workflow. This is so that the files can be updated and new revisions created and not imported as duplicate documents.

View Family File Changes

Complex Revit model can use many family files and multiple instances of those family files. Meridian provides a **Family Inspector** command to help you track the instances, their current status, and location.

Note:

The **FamilyInspector** value of the following registry value on the PC must be set to **1** to make the command available:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Cyco\AutoManager  
Meridian\CurrentVersion\RevitLink
```

To view the family file changes:

1. In Revit, open the building model for which you want to see its family files.
2. In the **Accruent** group of the **Add-Ins** menu in Revit, select **Family Inspector**.

The **Document Families** dialog box appears and lists information about the families used in the current model. Families that have changed since you last viewed the list appear in red text.

Note:

Changed families are only highlighted in red text once. If you close and reopen the **Family Inspector**, the previously red families will then appear black even if they have not actually been changed.

Office Link

The Meridian application link for Microsoft Office supports automatic property value exchange between the Meridian vault and Office document properties (PowerUser client only). When the link is installed, a **Accruent** toolbar is added to Word, Excel, Outlook, and PowerPoint versions 2003 and later for manually synchronizing and editing Meridian properties. In the Office 2013 and later applications, the commands appear on the menus and ribbons.

The link also provides automatic hyperlink and reference file management regardless of where the files may reside in a vault, including local workspace. This means that Meridian can maintain the referential integrity of file links as you import files into a vault, move them, create revisions, and even exchange files with other parties using packages. When you open a document in an Office application that has a link to another file, the Office link finds the current locations of the file in the vault and updates the location of the files in the parent document. The link will even detect if the linked files have been renamed in the vault and will resolve them correctly in Office.

The Office link automatically creates and maintains Meridian references between documents and their linked files. These links can be used to view documents that might be effected by changes to a parent document and for other uses.

Together with the basic integration provided by Application Integration, any file created or used by Office can be managed in a Meridian vault. Conversely, Office commands that request a file can access Meridian vaults for document selection.

Meridian also works with Office documents even without Application Integration installed:

- Open Office documents as described in [Open a Document From Within Meridian](#).
- Create new Office documents as described in [Create a New Document From A Template](#).
- Import existing Office documents as described in [Import Files Using Drag And Drop](#) and [Import Documents](#).

Features for storing Outlook email messages and attachments in a vault are also provided by the link.

Notes About Functionality

- Opening documents in the Office applications and synchronizing with Meridian Cloud requires the [Meridian Cloud Connector](#).
- The functionality provided in Office by Application Integration is subject to the general limitations of Application Integration described in [Application Integration](#).

- The link to MS Visio must be enabled by setting registry values that are described in HKEY_LOCAL_MACHINE\Software\Microsoft\Visio\AddIns\AMOfficeAddIn.AMOfficeAddIn in the *Meridian Enterprise Administrator's Guide* .
- The **Accruent** toolbar can be found on the **Add-Ins** tab of the ribbon in Office versions 2007 and later (except Visio).
- The vault **Browse** command on the **Open** and **Save As** pages in the Office 2013 and later applications requires that a default vault be set for the **Set Default Context** option as described in [Application Integration Options](#).
- In PowerWeb with Application Integration set to Remote mode:
 - If a vault document is modified and saved in an Office application, the file will not be uploaded to the Meridian server as might be expected. The document will not be uploaded until the document is closed. This is due to a technical limitation in Office. Until the limitation is resolved, users should always save the document in Word before closing the document
 - When a document is imported and the **Select Document Type** dialog box or wizard page is invoked, if the **PowerWeb Personal Preference** option [Create thumbnails on import of document](#) option is selected, the new file is created when you save to the workspace, but it is empty.

Edit Properties In Office

Synchronizing Meridian properties from Office properties is an easy way to update some Meridian properties, but you may encounter circumstances where you want to edit Meridian properties that are not linked to Office properties. Rather than open a Meridian application, you can edit properties without leaving the Office applications.

To edit properties from within Office applications:

1. On the **Accruent** toolbar in the Office application, select **Properties**.
The Meridian property pages appear just as they would from within Meridian.
2. Click **Edit**.
3. Make your changes.
4. Click **OK**.
The Meridian properties are updated.

Link Files

The Microsoft Office applications make it relatively easy to share data between them and other files without importing the data. You can do this using Object Linking and Embedding (OLE) links. For example, you can link a picture to a cell in an Excel spreadsheet or link a spreadsheet into a Word document. The linked data will appear in the linking document but not be stored there. Whenever the picture or spreadsheet is updated, the linking documents will be updated automatically.

You can determine if an Office document has links to other documents by the presence of the **Edit Links to Files** command in the **Prepare** group of the Office menu.

Note:

Although OLE objects inserted into non-Office documents (for example, Excel spreadsheets inserted into AutoCAD drawings) are shown for some file formats by the viewer, references between the documents are not automatically created by the application links. You can create references manually as described in [Create References](#).

Best Practices

The keys to creating links with corresponding Meridian references are:

- Use the Office application's **Link to File** option.
- Do not use Meridian Application Integration to select the linked file. Because of its universal application, it will create an insertion (embedded object) instead. Therefore, the linked file must reside outside the vault, at least temporarily, so that you can select it with the Office application's file dialog, which cannot browse vault contents.
- After inserting the link, save the linking file so that the link can be read by the Office link.
- Use the **Synchronize References from File** command in PowerUser to read the link from the linking document and create the reference.

The following procedures use the example of linking a picture into a Word document. For instructions for other combinations, refer to the Office Help. The procedure will be similar but the commands to use in the Office applications are different.

Link Office Files Outside of Vault

To link Office files that reside outside the vault and to import them into the vault:

1. Open the file in Word which you want to create the link.
2. On the **Insert** tab of the ribbon, click **Picture**.
The **Insert Picture** dialog box appears.
3. Select the picture that you want to insert, click the down arrow in the **Insert** button, and select **Link to File**.
The picture appears in the open file.
4. Save and close the file.
5. Import both files into the vault as described in [Import Files Using Drag And Drop](#).
The documents appear in the vault. However, the Meridian reference has not yet been created.
6. Select the linking (Word) document and then on the **Document** menu, select **Synchronize References from File**.
Reference icons appear on the **Document** property page of both documents. An **Microsoft Word Reference** type link has been made from the Word document to the picture file that you linked and imported. The name of the reference is the file name of the linked picture. The direction of the reference is from the Word document to the picture document. You can view the reference as described in [View References](#).

Link Office File in Vault to File Outside of Vault

To link an Office file that is already in the vault to a file that is not in the vault:

1. Open the vault document in Word in which you want to create the link.
2. Browse to your local workspace folder where the open document is cached and place a copy of the picture file there to which you want link.
3. On the **Insert** tab of the ribbon, click **Picture**.
The **Insert Picture** dialog box appears.
4. Select the picture file outside the vault, click the down arrow in the **Insert** button, and select **Link to File**.
The picture appears in the open file.

5. Save and close the file.

The picture appears in the vault document in the viewing pane. However, it still resides outside the vault and other users will not be able to see the picture when they view the vault document.

Note:

The Application Integration icon in the system tray of your desktop may begin to alternate with a warning icon. This is because the file that you copied there has been detected by Application Integration and a corresponding vault document cannot be found. Therefore, your local workspace is not synchronized with the vault.

6. Import the linked file into the vault as described in [Import Files Using Drag And Drop](#).

Although there is now a copy of the linked file in the vault, the linking document is still linked to the copy outside the vault.

7. Open the local workspace log and import the picture file as described in [Resolve Local Workspace Conflicts](#).

The picture file appears in the vault and the local workspace should now be re-synchronized with the vault. However, because you saved the Word document while the picture file resided in the local workspace, no reference has yet been created.

8. Select the linking (Word) document and then on the **Document** menu, select **Synchronize References from File**.

Reference icons appear on the **Document** property page of both documents. An **Microsoft Word Reference** type link has been made from the Word document to the picture file that you linked and imported. The name of the reference is the file name of the linked picture. The direction of the reference is from the Word document to the picture document. You can view the reference as described in [View References](#).

Link Office Files in a Vault

To link Office files that both reside in the vault:

1. In PowerUser, view both files that you want to link so that they are cached in your local workspace.
2. In your local workspace, locate the file to which you want to link.

To find where the picture file is located in the local workspace on your computer:

- a. Right-click the Application Integration icon in the system tray, point to **Local Workspace**, and select **Open Local Workspace Folder**.

A new Windows Explorer window opens with your local workspace folder selected.

- b. Open the folder that is named for the Meridian Enterprise server and vault where the linking document resides.
- c. Navigate the subfolders to find the cached picture file.

It will be in the same path in your local workspace as the path where it resides in the vault.

3. Open the vault document in Word in which you want to create the link.

4. On the **Insert** tab of the ribbon, click **Picture**.

The **Insert Picture** dialog box appears.

5. Navigate in your local workspace and select the cached picture file, click the down arrow in the **Insert** button, and select **Link to File**.

The picture appears in the open file.

6. Save and close the file.

The picture appears in the vault document in the viewing pane. Reference icons appear on the **Document** property page of both documents. An **Microsoft Word Reference** type link has been made from the Word document to the picture file that you linked. The name of the reference is the file name of the linked picture. The direction of the reference is from the Word document to the picture document. You can view the reference as described in [View References](#).

Outlook Email Integration

Meridian Enterprise integrates with Microsoft Office Outlook 2003 or higher to help you store important email messages and attachments in a vault. The Outlook link adds a **Accruent** toolbar with commands for storing messages and their attachments and for configuring the link options.

A unique feature of the Outlook email integration is virtual folders. These are locations that you select within vaults that are then shown as folders in a special branch of the **Mail Folders** tree in Outlook. You can use virtual folders two ways:

- Drag and drop messages onto a virtual folder to store the messages in the corresponding vault location
- Select a virtual folder to open it in the PowerWeb interface in the folder contents pane of Outlook. You may then use PowerWeb the same as if you had opened it in a web browser.

Note:

- The Outlook application link only supports storing messages and attachments. It does not support storing Outlook contacts, appointments, tasks, distribution lists, and so on.
- Microsoft disabled virtual folders in Outlook 2010. It can be re-enabled as described in [Home Page tab not available in Folder Properties](#). Microsoft discontinued all support for virtual folders in Outlook 2016.

You use the buttons on the **Accruent** toolbar to work with messages and attachments.

To show the **Accruent** toolbar:

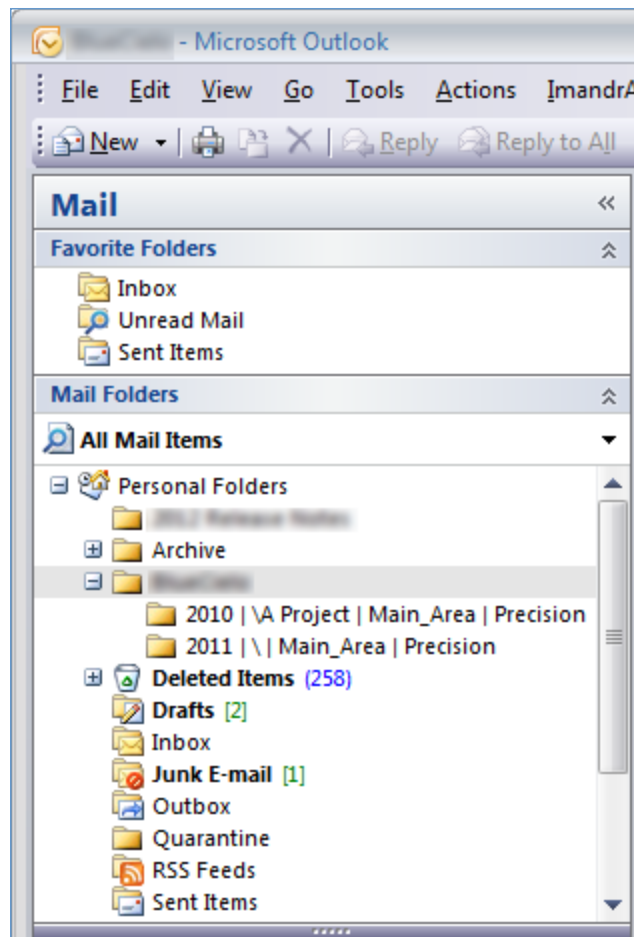
1. Choose between two options:
 - In Outlook 2010 and later, click the **Add-Ins** tab of the ribbon.
 - In Outlook versions prior to 2010, from the **Tools** menu, select **Customize**.
The **Customize** dialog box appears.
2. On the **Toolbars** page, select **Accruent**.
The **Accruent** toolbar appears.
3. Click **Close**.

Store Outlook Messages And Attachments

Meridian guides you through the process of selecting the destination and document types for messages and their attachments that you store in the vault.

To store Outlook messages and attachments:

1. Choose between two options:
 - If you have not yet configured vault contexts as described in [Configure Outlook Email Integration Options](#):
 - a. In Outlook, select the email messages that you want to store in a vault.
 - b. On the **Accruent** toolbar, click **Store Message**.
The **Open Vault** dialog box appears.
 - c. Select the vault where you want to store the messages and click **OK**.
The **Select Folder** dialog box appears.
 - d. Select the folder where you want to store the messages and click **OK**.
The **Document types** dialog box appears.
 - If you have already configured your favorite vault contexts and enabled the **Support Meridian Virtual Folders** option as described in [Configure Outlook Email Integration Options](#):
 - a. Select the email messages that you want to store in a vault.
 - b. Drag and drop the messages onto one of the contexts listed under **Accruent** in the Outlook **Mail Folders** tree that appears similar to the following figure.



The **Document types** dialog box appears. The **Document types** dialog lists the messages that you selected, the default document type that will be assigned to the messages, and the destination folder that you selected. The selected messages appear in a list with any attachments listed beneath each message as parts of the message.

The name for each message is generated as described in [Configure Outlook Email Integration Options](#). Attachments will be saved with their original file names. The dialog box will be empty if you have not selected any messages.

To view the email and file properties for a message or attachment, right-click the file. The **Properties** dialog box appears.

- c. Clear the check boxes in the **X** column for any messages or attachments that you do not want to save in the vault.

You should clear all unnecessary attachments such as footer images, signatures, and so on so that they are not saved in the vault. A System Administrator might


have configured the Office link to automatically filter out these attachments already.

2. Verify that the document types shown in the **Document types** column are correct.

To select a different document type, click the current value and select a different type from the list that appears.

3. Verify that the locations shown in **Destination Folder** are correct.

To select a different destination:

- a. Hover your cursor over the location that you want to change and click the **Ellipses** button .

The **Select Folder** dialog box appears.

- b. Select a destination folder and click **OK**.

The selected folder appears in **Destination Folder**.

Note:

Scopes have no effect in Outlook email integration.

4. When all information in the window is correct, click **OK**.

The message and its attachments are saved in the vault. If the message included attachments, the attachments are saved in the same folder as the message and linked with an **Email Attachment** type reference similar to other referenced documents.

Note:

If a System Administrator has configured the vault with a Field-Path definition that uses any properties that are also used by the Outlook email integration, your message will be stored in a folder controlled by the Field-Path definition instead of the folder that you selected when you stored the message. Contact a System Administrator for assistance.

Add Reference IDs To Messages

When many email messages that have the same or similar properties are stored in a vault, it can become difficult to identify particular messages. Meridian can help by appending a unique identifier onto the end of the subject text during message creation. This identifier can make it easier to refer to specific messages when communicating with other users or when creating references to related documents.

To add a reference ID to a message subject:

1. Choose between two options:
 - To add the reference ID after typing your subject:
 - a. When creating a new message in Outlook, type text in **Subject** and save the message.
You must save the message or else your text will be replaced by the text entered by Meridian.
 - b. On the **Accruent** toolbar, click **Create RefID**.
The text - **RefID: NNNN-NNNN** is appended to the end of your subject text where **NNNN-NNNN** is a unique eight character hexadecimal number based on the current date and time.
 - To add the reference ID before typing your subject:
 - a. When creating a new message in Outlook, before you type text in **Subject**, on the **Accruent** toolbar, click **Create RefID**.
The text - **RefID: NNNN-NNNN** is set as the subject text where **NNNN-NNNN** is a unique eight character hexadecimal number based on the current date and time.
 - b. Type your own subject text in **Subject** preceding the text entered by Meridian.
2. Complete and send the message as usual.

Configure Outlook Email Integration Options

You can configure Outlook email integration to work the way you want. For assistance configuring these options, consult a System Administrator.

To personalize your Outlook application link configuration:

1. Open Microsoft Outlook.
2. On the **Accruent** toolbar, click **Options**.
The **User Options** dialog box appears.
3. Click options or type values using the descriptions in the following table.
4. Click **OK**.

Outlook integration options

Option	Description
Accruent vaults	<p>Lists the vault contexts that you have selected for display in the Outlook Mail Folders tree. Each context that you select appears as a folder in the tree onto which you can drop messages to quickly store in that location in the vault.</p> <p>To add a context:</p> <ol style="list-style-type: none"> 1. Click Add. The Open Vault dialog box appears. 2. Select the vault that you want add and click OK. The Select Folder dialog box appears. 3. Select the folder where you want to store messages and click OK. The location is added to the Context list. 4. If the name of the context in the tree is too long or if you would like to give it a different name, type a name in the Alias column for the context. <p>To remove a context:</p> <ul style="list-style-type: none"> • Select the context that you want to remove and click Remove. The context is removed.
Support Accruent Virtual Folders	<p>Displays the contexts listed in Accruent vaults as folders within the Outlook Mail Folders tree for drag-and-drop importing of email and attachments. For instructions, see Store Outlook Messages And Attachments.</p>

Option	Description
Message name builder	<p>Use the lists to construct a naming standard for messages that you save in the vault. Each list contains message properties from which you can select. Type separator characters to format the naming standard for best readability. Only valid Windows file name characters are allowed. The Example field displays a sample name based on your current settings.</p> <p>All users of a vault should configure the same naming standard so that they can identify all messages.</p>

Lotus Notes Link

Meridian Enterprise integrates with Lotus Notes in the form of an **Email Export** button for exporting messages and their attachments to a Meridian vault. The process allows you to choose a destination Meridian server, vault, and folder as well as document types for each file exported to the vault.

Before you can export messages to a vault, a Lotus Notes administrator must first configure the vault to receive messages. The administrator will send you an email message containing a button you must click to create the **Email Export** button in Lotus Notes.


Note:

You must have either **Manager** access or **Designer** and **Create LotusScript/Java agents** access to your mail database to install the integration.

Export Lotus Notes Messages And Attachments

You must install the integration using the button in the email message sent to you by a System Administrator before you can export messages and attachments from Lotus Notes.

To export messages and attachments from Lotus Notes:

1. Open Lotus Notes and open your email database.
2. Select the messages that you want to export.
3. Click the **Email Export** button  on the Universal toolbar.

The **Lotus Notes Export** dialog box appears.

4. Click the **Browse** buttons to select locations or type locations using the descriptions in the following table.
5. Click **Proceed**.

Another **Lotus Notes Export** dialog will appear, listing the messages and attachments that will be exported to the selected vault.

6. Confirm that the correct messages and attachments are listed and select a document type for each one in the **Document Type** column.

Note:

- You should clear all unnecessary attachments such as footer images, signatures, and so on so that they are not saved in the vault.
- The document types listed for your selection are configured by a System Administrator.

To view the email and file properties for a message or attachment, right-click the file. The **Properties** dialog box appears.

7. Click **Export**.

The messages and their attachments are exported to the vault. The **Export summary statistics** dialog opens to show the results.

8. Click **Close**.

Lotus Notes export options

Option	Description
Server name	The name of the Meridian Enterprise server that hosts the vault to which you want to export the messages.

Option	Description
Vault name	The name of the vault where you want to export the messages.
Imported messages folder	The name of the folder where you want to export the messages.

If the exported messages included attachments, the attachments were saved in the same folder as the message and linked with an **Email Attachment** type reference, similar to other referenced documents.

Note:

If your System Administrator has configured the vault with a Field-Path definition that uses any properties that are also used by the Lotus Notes email integration, your messages will be stored in a folder controlled by the Field-Path definition instead of the folder you selected when you stored the message. Contact your System Administrator for assistance.

Glossary

A

Active Directory

A Microsoft directory service that provides central authentication and authorization services for Windows-based computers.

AMFS

The InnoCielo File System service that makes vaults available through the Windows file system.

approved

A workflow status that indicates that a document that has been approved for reproduction, distribution, manufacture, or construction.

archive

When used as a noun, a repository of obsolete documents kept for possible future reference. When used as a verb, the process of exporting obsolete documents from a repository.

assign to work area

The process of creating a copy of a document in a work area to isolate its changes from the original revision in the Main area.

attribute

When used to describe a file system, it is a property of a file such as Hidden, System, or Read Only. When used to describe an AutoCAD drawing, a named object in a drawing that is included in a block definition and used to store alphanumeric data.

audit log

A system-generated record of the date and time of user actions that create, modify, or delete critical business data.

audit trail

A system-generated record of the date and time of user actions that create, modify, or delete critical business data.

authorization key

The ten character hexadecimal code generated by BlueCielo ECM Solutions that authorizes a software license indefinitely. Authorization keys are generated based on

the license serial number, license key, and return key specific to each installation.

B

baseline

When used to describe Meridian Enterprise, a named moment in time in the history of a vault, such as a milestone.

Basic Authentication

A method designed to allow a web browser, or other client program, to provide credentials – in the form of a user name and password – when making a request from a server.

briefcase

An Accruent portable document package. A briefcase is a single file in an archive format that may contain multiple discrete documents. Briefcases may be in open standard formats such as ZIP and RAR, the Accruent BRC format, or custom formats. A briefcase may also contain document metadata in a data file and, in the Accruent BRC format, document redlines.

C

client

A computer, object, or program that obtains data or services from a server.

COM

Component Object Model - an interface standard for software componentry by Microsoft used to enable interprocess communication and dynamic object creation by programs.

content

The electronic data associated with a document.

content indexing

The process of extracting and indexing text data from documents for full-text searching. See also "full text search".

context

When used to describe Meridian Enterprise, a frame of reference comprised of a specific compartment of a vault and a moment in time for viewing the content of a vault.

criterion

A search filter condition comprised of a property name, operator, and value.

current

In general, the object that a user has selected or an object that is currently within the scope of a programming expression. When used to describe the history of a document, the latest revision of a document, which might not yet be released.

D

data source

An external data file or database that provides data that is presented by or imported into a Accruent system.

database

A structured set of document metadata used by a Accruent system. The database may be managed by Hypertrieve, SQL Server, or Oracle depending on the system.

DB

An Oracle database.

DCOM

Distributed Component Object Model - a Microsoft proprietary technology for software components distributed across several networked computers to communicate with each other.

derive

To create a new document based on an existing document. Also the name of a Meridian Enterprise command.

destination state

The state of a Meridian Enterprise workflow that follows a workflow transition.

details page

A type of property page that displays the properties of a document.

digital signature

A digitized image of a person's handwritten signature. See also "electronic signature".

discard

When used to describe Meridian Enterprise, to cancel the process of revising a document and delete the file copy that is being edited.

document

Information recorded on a medium (paper, digital media, and so on) for communication to others.

document controller

A person within a facility owner/operator organization that is responsible for the management of project documents.

document type

A classification of documents that share one or more document management characteristics such as format, purpose, or security.

document type workflow

A predetermined sequence of steps through which a document must be processed to generate a new approved revision in Meridian Enterprise. The workflow is defined by the document type from which the document was created.

document view

A view of a Meridian Explorer repository that displays documents.

document workflow interlock

A rule consisting of specific document types and property filters that limit when a project's workflow may proceed. Interlocks are configured by a System Administrator with the Meridian Enterprise Configurator application. Interlocks are available only with the Meridian Advanced Project Workflow Module.

domain controller

A server that responds to security authentication requests (logging in, checking permissions, and so on) within a Windows Server domain.

dynamic collection

A Meridian Enterprise saved search in which the search criteria are reevaluated and the results are updated whenever the collection is displayed.

E

e-signature

An electronic indication that a person adopts the contents of an electronic message. See also "digital signature".

ECM

Engineering Content Management. Content management as it applies specifically to engineering.

EDM

Engineering Document Management. Document management as it applies specifically to engineering documents.

effectivity

An attribute of a Meridian Enterprise property that determines when changes to its value apply within the life cycle of a document.

electronic signature

An electronic indication that a person adopts the contents of an electronic message. See also "digital signature".

environment

An organization's overall computing platform.

Explorer view

The view of a Meridian vault that displays documents organized within the Field-Path Relation.

external page

A type of property page that displays a web page that is hosted on a different information system.

F

Field-Path Relation

A hierarchical structure defined by properties that determines the folder structure of a vault and the locations of documents according to the values of the properties.

Folders view

The view of a Meridian Enterprise vault that displays documents organized by the vault's Field-Path definition.

FS

An acronym for file system.

full-text search

A method of searching for text contained in document content as opposed to searching document metadata. See also "content indexing."

G

grid view

Name of a Meridian Explorer view mode that displays search results in tabular format.

GUID

An acronym for Globally Unique Identifier.

H

history

A configurable option of a Meridian vault that causes it to save changes to documents and metadata over time. Allows users to view prior revisions of documents and their property values at specific moments in the past.

History mode

A configurable option of a Meridian vault that causes it to save changes to documents and metadata over time. Allows users to view prior revisions of documents and their property values at specific moments in the past.

HTTP

An acronym for Hypertext Transfer Protocol.

hybrid drawing

A drawing composed of both vector graphics and raster image files.

I

import

The process of creating a new file in a vault from a file outside the vault or repository .

inactive user

A user account that has been deactivated. The account is not deleted but the user cannot use the application. The account can be reactivated later.

initiate

The act of starting a new revision of a document by performing the first step of a workflow.

issue code

The name of a Meridian Transmittal Management Module property that stores a standard keyword or phrase. The issue code describes the reason why a transmittal was issued.

L

layout

A configurable arrangement of items on a form or page.

LDAP

An acronym for Lightweight Directory Access Protocol.

Local Workspace

A portion of disk space on a user's computer reserved for caching documents when they are viewed or edited. Using Local Workspace improves performance when working with very large documents. Meridian Enterprise's local workspaces can be synchronized with the vault at a configurable interval.

lookup list

A list of predetermined values for a property that is presented to the user for selection. Lookup lists can be either managed in the application or linked to an external database or query.

M

Main area

The area of a Meridian vault where released documents reside.

manager

The Meridian user who initiated the current document workflow and the only person with permission to change the current To-Do Person.

master document

In Meridian Enterprise, a released document from which one or more project copies are made that become either independent documents or new revisions of the master document. Master documents are designated by Meridian Enterprise and the Meridian Advanced Project Workflow Module. In Accruent Project Portal, a document to which a master file is attached.

Meridian Enterprise Server application server

The Meridian Enterprise Server data access and business services running on a server computer. May also be used to refer to the server hosting the services.

Meridian Explorer client

The Meridian Explorer application installed on the Meridian Enterprise Server web server.

metadata

Information that classifies, supplements, or describes a document. Metadata is commonly used to find documents as opposed to searching for data within documents (see "full-text search"). Metadata may also be used for a variety of other purposes.

N

NAT

An acronym for Network Address Translation.

Navigation view

A view of a Meridian vault that displays documents organized in a hierarchical structure according to a predefined set of properties.

O

OS

An acronym for operating system.

OU

An acronym for organizational unit.

P

package

A set of files that are used together for a common purpose. The files are often bound together in a single archive file for convenience when transporting, such as .zip and .msi files. Examples of file packages are software distribution packages and submittal packages. See also “briefcase.”

pane

A separate area of a split or single window used to display related data.

performance counter

Stores the count of specific program activities on a computer to conduct low-level performance analysis or tuning.

PowerUser

The Meridian desktop client software. Not related to the Windows administrative group Power Users.

PowerWeb

The Meridian Enterprise web browser-based client application.

preselection

A property filter that can be applied to a Meridian Explorer view to limit the number of visible items.

privilege

The right of a user to view specific data or execute a specific command. Privileges are assigned by a System Administrator.

project copy

A copy of a master document made for the purpose of creating a new independent document or creating a new revision of the master document. Project copies can be created in Meridian Enterprise.

project definition

A template used to create special folders in a vault that can represent design project processes. Project definitions are configured by a System Administrator with the Meridian Enterprise Configurator application. Meridian Advanced Project Workflow Module project definitions consist of a custom folder type, a workflow, and optional project workflow interlocks or document workflow interlocks. A project definition may restrict folders from being created at the root of a vault and may restrict creation of subprojects (Meridian Advanced Project Workflow Module only).

project folder

A folder created from a project definition template.

project workflow

The workflow of a project folder as defined by the project definition template from which it was created. Configured by a System Administrator with the Meridian Enterprise Configurator application.

project workflow interlock

A rule comprised of specific sub-project folder types and property filters that is applied to a project or subprojects that limits when a project's workflow may proceed. Interlocks are configured by a System Administrator with the Meridian Enterprise Configurator application. Interlocks are available only with the Meridian Advanced Project Workflow Module.

property

Descriptive data used to identify, classify, and find documents. Properties are organized into related groups called property sets.

property navigation

A dynamic search method in which a user progressively reduces the number of documents found by selecting from additional property values.

property page

A secondary window, usually displayed with a tab, that displays the properties of an object such as a document.

property set

A group of related properties.

publish

To create a copy of a document in another information system, optionally in a different electronic format.

purge

To completely and permanently delete data from a system.

Q

query

A search command comprised of one or more search criteria often expressed in Structured Query Language (SQL) syntax.

Quick Change

A very simple document workflow consisting of only two steps, Start Quick Change and Release Quick Change that may or may not increment the document's revision number depending on the configuration of the document type.

R

reassign

To immediately assign a document to the current work area for additional changes after discarding or releasing the current revision.

recovery log

The log of vault documents that can be executed in order to export the documents from a vault to a specified location on the file system. The recovery log is created for use in the event of a critical disaster to provide continued access to documents.

redline

Corrections to a drawing made graphically on a copy of the drawing. Redlines can be created for electronic drawings with the InnoCielo viewer by a user with the appropriate security privileges.

reference

A link that represents a relationship between two documents. References can be created automatically by Meridian (for example, AutoCAD External Reference) or manually by a user.

reference type

A classification of references that share one or more document management characteristics such as purpose, source or destination document types, or security.

references page

A type of property page that displays the references of a document.

related documents page

A type of property page that displays the documents that are related to the selected object.

related tags page

A type of property page that displays the asset tags that are related to the selected document.

release

The final step (transition) of a Meridian Enterprise workflow. When describing project workflow, refers to a new revision of a master document that was created from the content of a project copy. When describing document type or workflow definition workflows, refers to a new revision of the document that was created by completing the document's workflow.

render

Rendition (noun) refers to a copy of a document in a format other than the original.
Render (verb) refers to the process of creating a rendition.

rendition

Rendition (noun) refers to a copy of a document in a format other than the original.
Render (verb) refers to the process of creating a rendition.

repository

The largest logical container of a document management system for storing documents and metadata. A repository commonly contains all of the documents for a single organization, division, department, workgroup, or other purpose, organized into folders and sub-folders. The fundamental container of a Meridian Explorer system.

result grid

A configurable grid view used to display documents or tags found by a search.

retire

To classify a document as obsolete and prevent it from being revised.

return code

A standard keyword or phrase that represents the reason why a submittal was issued.

review

The process of evaluating the accuracy and completeness of revisions to a document.

revision

A milestone in a document's history that represents approved information at particular point in time identified by a number or letter.

revisions page

A type of property page that displays a list of the revisions of a document.

revoke

The act of canceling revision of a working copy of a document and deleting the copy being edited.

role

A named set of privileges to which users or groups are assigned by an administrator.

RPC

Acronym for Remote Procedure Call.

S

saved search

A user-defined set of search criteria that is saved for future reuse.

scope

A Meridian Enterprise feature that limits vault functionality and the visible information to named sets. A scope can be selected by users to make the system easier to use or to gain access to different documents.

search layout

A configurable combination of repository navigation and search filter parameters used by Meridian Explorer.

server

A centralized computer or application that provides services to one or more client computers or applications in a network.

shared workspace

A special folder in a Meridian Enterprise vault that is used to store files to support multi-user applications. The vault folder is mapped to a shared network location outside the vault that is used instead of local workspaces on the users' computers. Meridian Enterprise synchronizes the contents of the shared network location with the vault folder. Configurable options control other behaviors specific to using a shared workspace.

shortcut bar

The name of the accordion control containing shortcuts to views, vaults, and baselines that can be displayed in the left pane of the Meridian Enterprise desktop application.

SID

An acronym for System Identifier. A name that identifies a specific instance of a running Oracle database.

SMTP

An acronym for Simple Mail Transport Protocol.

snapshot

A read-only copy of metadata made so that slower data backup processes can occur while the application continues writing to its data. Backing up a snapshot minimizes maintenance downtime.

source state

The state of a workflow that precedes a workflow transition.

SSL

An acronym for Secure Sockets Layer or Transport Security Layer.

SSL/TLS

An acronym for Secure Sockets Layer or Transport Security Layer.

static collection

Saved search results that are displayed without reevaluating the search criteria.

sub-project

A Meridian Enterprise project folder contained within another project folder that can represent a subordinate process. Subprojects are available only with the Meridian Advanced Project Workflow Module.

submit

When used to describe a document, means to check in the working copy of a document that is under revision. Equivalent to releasing a document from a workflow.

submittal

A package of documents received by an organization for review, reference, modification, or final delivery.

T

tag

A vault or repository record that represents a logical asset stored in a separate maintenance management system. The logical asset represents a physical asset that is present at a facility that is managed with the maintenance management system. A tag may reference one or more documents, or the reverse.

tag type

The document type that is configured for use as asset tags.

thumbnail

A small preview image that is shown to assist the user in identifying a file.

TLS

An acronym for Secure Sockets Layer or Transport Security Layer.

To-Do List

The name of a navigation view in Meridian Enterprise.

transaction isolation

A property in a database system that defines how and when the changes made by one operation become visible to other concurrent operations.

transition conditions

Property value filters and logical expressions that are evaluated to determine the validity of a workflow transition to be executed by a user.

transition equivalence

The equality of a Meridian Enterprise transition in one document workflow to a transition in another document workflow. Transition equivalence makes it possible to execute a transition for one document in a batch of documents and have it also execute transitions in the other documents within the batch even if the transitions don't have the same name, source state, or destination state. Configured by a System Administrator with the Meridian Enterprise Configurator application. Transition equivalence is available only with the Meridian Advanced Project Workflow Module.

transmittal sheet

A cover letter for a submittal that lists the names and other property values of the documents that are included in the submittal. It might also include comments about the status of the documents or the project, instructions to the recipient, and a date by which a response to the submittal is due back to the sender.

U

unretire

To reverse the effects of retiring a document so that it can be revised.

URL

An acronym for Uniform Resource Locator used to specify Internet and intranet addresses.

V

vault

A Meridian repository for storing documents related by organization, division, department, workgroup, or purpose.

VBScript

The Visual Basic scripting language (Visual Basic Scripting Edition).

version

A document derived or copied from another document of the same revision.

VPN

An acronym for Virtual Private Network.

W

WAN

An acronym for wide area network.

watermark

Textual or graphic information overlaid on a printed document used to indicate authenticity or validity.

Web Access

The Meridian Enterprise web browser-based client application.

web client

A client application that is presented in a web browser.

Work Isolation mode

The vault setting that defines how and when the changes made by one user become visible to other concurrent users.

workflow

A predetermined sequence of steps used to produce standardized results.

working copy

A temporary copy of a document made for making changes as an alternative to document workflow.

workstation

A personal computer used by an individual in a network. A workstation is the client in a client/server system.

X

X-Ref

An AutoCAD drawing that is linked to, but not inserted into, the current drawing. Changes made to referenced drawings (X-Refs) are automatically displayed in the current drawing when the current drawing is opened.

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