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ACCRUENT MERIDIAN

USER'S GUIDE

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Meridian Enterprise Introduction

The Meridian Enterprise product suite is an on-premises engineering document management system (EDMS) and asset lifecycle information management (ALIM) Accruent solution. Meridian Enterprise streamlines engineering-related business processes in specific industries including chemicals, pharmaceuticals, oil and gas, metals and mining, and utilities. Meridian helps your organization manage technical documents and drawings throughout its lifecycle, providing a centralized repository to store, organize, and control engineering documentation.

Meridian Enterprise includes:

- **PowerWeb**: Create and modify engineering data.
- **Explorer**: Search and retrieve engineering information.
- **Configurator**: Customize document types, workflow, roles, and other organizational procedures.
- **Administrator**: Manage users, licenses, and vaults.
- **Administration Console**: Manage users, licenses, jobs, repositories, and other settings.
- **Application Integration**: Streamline working with file-based applications by utilizing site cache and managing local workspace.
- **Microsoft Office link**: Synchronize metadata and references with Microsoft Office applications.
- **Autodesk links**: Synchronize metadata and references with AutoCAD family, Revit, and Inventor.
- **MicroStation link**: Synchronize metadata and references with MicroStation.

Meridian Enterprise supports regulatory compliance. it includes an FDA module to help your organization maintain the integrity and traceability of its documentation. 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.

Meridian Enterprise can integrate with Meridian Portal, a web application for internal and external collaboration in engineering projects. Contact your Accruent account representative for further information.

What's In This Guide

This guide describes how to use Meridian Explorer to find and view information about items stored in a repository. Installing, configuring, and administering Meridian Explorer is documented in the *Meridian Enterprise Server Administrator's Guide*.

This guide explains how to:

- Browse, navigate, and search Explorer repositories for documents and tags.
- Search for text contained within documents.
- Export document lists to Microsoft® Excel®.
- Save searches for reuse and delete them.
- View, draft print, download, and hyperlink to documents.
- Redline and submit feedback about documents for review by Meridian Enterprise users.

Who Should Read This Guide

This guide is intended for Meridian Explorer repository 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.

Open a Repository

Opening a Meridian Explorer repository is as simple as opening any other website.

Open when Explorer isn't open

To open a repository when Meridian Explorer is not already open:

- If a System Administrator has created a shortcut to the repository on your desktop, double-click the shortcut.

  Meridian Explorer opens the repository that is referred to by the shortcut in your default web browser.
- Open your web browser and type the following into the address box and press **Enter**:

  ***<ServerName>*/BCEnterprise**

  Where ***<ServerName>*** is the name of your web server.

  Meridian Explorer opens the **Home** page in your web browser.

Open when Explorer is open

To open a repository when Meridian Explorer is already open:

- On the **Home** page, select a view of the repository that you want to open.

  The **Views** pane contains the views that have been configured by a System Administrator from all available repositories.The view opens in a new view page in the Meridian Explorer window. For a description of view pages, see View Pages.

Home Page

The Meridian Explorer **Home** page is the first page to appear when you open Meridian Explorer. It is also the place to start looking for items. This page lists groups of views that are available to all users. Each view can be of a different repository or of the same repository.

The following table describes the major features of the **Home** page and refers to other topics that describe the features in more detail.

Features of the Home page

Name	Description
Home page menu	Select an item to see its contents at right.
Views	Click to show the **Views** list.
Favorites	Click to show the **Favorites** list.
Saved Searches	Click to show the **Saved Searches** list.
Dashboard	Shows statistics and graphics about the contents and activity of your repositories.
Recently Used views list	Lists views that you have used recently.
Views list	Lists groups of available views from which you can select one.
Your personal system preferences	Click to configure your personal preferences as described in Configure Personal Preferences and to configure file download options as described in Configure Options.
Recent Items list	Lists items that you have viewed recently.
Settings links	If you are a System Administrator, you can use these links to start Meridian Enterprise Server Configurator or configure the Meridian Explorer colors and logo.
Other hyperlinks	Hyperlinks configured by a System Administrator to other sites that you can use.
About Meridian Explorer	Click to show the software version, build number, and copyright information.
Help button	Click to show Help content.

Open a View

In Meridian Explorer, a view shows the data of the repository filtered by criteria that have been configured by a System Administrator. Multiple views can be configured for different purposes. Views with particular properties in common are grouped together into view groups by a System Administrator.

To open a view:

- On the **Home** page, select the view that you want to open from the **Recently used** or **Views** list.

  The view opens in the current browser window. For a description of view pages, see View Pages.

Open a Saved Search

Searches can be saved as described in Browse By Folders, Browse By Properties, and Search In Document Properties. Saved searches are shown on the **Home** page.

Open a Saved Search

To open a saved search:

1. On the **Home** page menu, click **Saved Searches**.

   Your saved searches appear in a list.

2. Click the saved search that you want to open.

   The view from which the search was saved opens in the web browser window. For a description of view pages, see View Pages.

View the Dashboard

The Meridian Explorer dashboard shows valuable information about the contents and the activity of your repositories similar to the following figure. The dashboard can contain tables, charts, pie graphs and gauges.

The dashboard comprises the following tabs by default:

- **Statistics**: Shows the current quantities of items in the repository
- **Charts**: Shows the trends of new items in the repository similar to the following figure

Current Repository

To view the dashboard for the current repository:

- On the **Home** page, click **Dashboard**.

  The dashboard opens in the current browser window and shows the **Statistics** tab.

Different Repository

To view the dashboard for a different repository:

- Select a different repository from the **Repository** list at the top of the page.

View Pages

When you open a view from the **Home** page or click the tab of an open view page, a view page appears that shows the items that match the view's configuration.

Each view page includes a navigation pane, a results pane, and a detail pane where indicated in the following figure. You use the navigation pane to explore and search the repository. As you explore, the contents of the current selection in the navigation pane are shown in the results pane. Selecting an item in the results list shows the item's details in the detail pane.

> **Note:**
> When Meridian Explorer is opened by another application, such as a maintenance management system when the Meridian Asset Management Module is installed, the features that are available and the documents that are shown in the results pane are determined by the application that opened the window.

The following table describes the major features of a view page and refers to other topics that describe the features in more detail.

Features of a view page

Name	Description
Home tab	Click to return to the **Home** page at any time.
Ribbon	Commands related to the current ribbon menu item.
Ribbon menu bar	Shows tabs for the available ribbons. The tab for the current ribbon appears highlighted. Click another tab to show a different ribbon.
Search box	Type text to search for in the current navigation tool as described in Search In Document Properties.
Navigation pane	Shows the repository navigation tools: navigation view, property-based navigation, object hierarchy, or form search, that you can use to browse the current repository. The default navigation tool when you first open a repository is set by a System Administrator. If you switch to a different navigation tool, Explorer remembers your choice and restores it the next time that you open the repository. To reset to the default navigation tool, see Configure Personal Preferences.
View name	Name of the current view.

Name	Description
Results pane	Shows the results of the current search or navigation view or the contents of the current hierarchy folder. By default, the results are shown in a grid. To run a command for a particular document or tag, right-click anywhere over its row. A shortcut menu of the available commands appears. For information about using the commands, see the related topics elsewhere in this guide.
Page controls	Use to browse, pages through, or refresh the contents of the results pane.
Your personal system preferences	Click to configure your personal preferences as described in Configure Personal Preferences.
Help icon	Click to show Help content.
Page **Close** icon	Click to close the current page.
Edit page length icon	Click to set the number of items shown in the results list.
Property page bar	Shows tabs for the property pages that are available for the current item. The tab for the current property page appears highlighted. Click another tab to show a different property page.
About Meridian Explorer 2026	Click to show the current version information.
Detail pane	Pages of properties for the item selected in the results pane as described in Property Pages.
Views bar	Switches the context to show the documents, tags, projects or collections in the current repository.
Window bar	Shows tabs for the open views or items. The tab for the current view appears highlighted. Click another tab to show a different view. Click the scroll button at either end of the view bar to see additional tabs that may be out of sight.

Browse By Properties

Browsing by property navigation lets you find items by dynamically building a filter based on existing values for key properties. As you select property values, the results pane list refreshes to show only the items with the selected values. This means that you will always find some items and that you can refine your search by selecting different or additional property values.

This method of finding items is useful when you are not sure what the values of the properties are but you can recognize them when you see them or when you want to try different property values. The properties that are available for property navigation are configured by a System Administrator. When you find the items that you are looking for, you can save the current view filter for later reuse.

To browse by properties:

1. In the ribbon menu, click **Search** > **Property based navigation**.

   A list of properties and their existing values appears in the **Navigation** pane. If more than the configured number of values for a property are returned, a **Filter** box is shown at the top of the list.

   You can use this to reduce the number of parent items, but for child items, this can result in more items being displayed because the parent item selection is not included in the search query. If the document or object search result is empty, a search for child items also shows no results.
2. If the **Filter** box is shown, enter the text you want to filter on and hit **Enter**.
3. Select a value for any property of the documents that you want to find.

   The results pane list refreshes to show the items that have the selected property value.
4. Repeat the preceding step for additional values until the results pane list includes the items that you want to find.
5. To clear a property filter, clear the check box next to its name.

Browse By Folders

Browsing by folders lets you find items in a folder structure similar to Meridian Enterprise and Windows Explorer. Each Explorer object type: documents, tags, and projects can have a different folder tree. When you find the documents that you are looking for, you can save the current view filter for later reuse.

The folder views do not show any project copies of documents or of tags.

To browse by folders:

- In the ribbon menu, click **Search** and then in the ribbon, click **Folders**.

  The folder tree for the current view appears.

  - To open a folder, click the expand icon ▷.
  - To close a folder, click the collapse icon ◢.
  - To view the contents of a folder, click the folder icon or the folder name.

    The results list refreshes to show the documents that are contained in the selected folder.

Browse With Navigation Views

Browsing by a navigation view lets you find documents by selecting values for properties in a hierarchical tree similar to the hierarchy folder structure described in Browse By Folders. The difference from hierarchy browsing is that at each level of the navigation view, as you select property values, only the values that exist in the property at the next level of the view are shown for you to select from. This means that you will always find some documents and that you can refine your search by selecting different or additional property values.

This method of finding documents is useful when you are not sure what the values of the properties are but you can recognize them when you see them or when you want to try different property values. Navigation views are configured by a System Administrator. When you find the items that you are looking for, you can save the current view filter for later reuse.

To browse by a navigation view:

1. In the ribbon, click **Search** and then in the ribbon, click **Navigation View**.

   The root level of the navigation view appears.

2. To view the property values of the next level of the navigation view without affecting the results pane, click the expand icon ▷.

   To hide the property values, click the collapse icon ◢.

3. To show the documents with a particular property value, click the property icon or the property value.

   The results pane list refreshes to show the documents that have the selected property value.

Search In Document Properties

Meridian Explorer provides two types of property searches: simple searches as described in this topic and advanced searches as described in Advanced Search. Simple searches let you specify values for the properties that you want to find.

The properties that are available for searching may be either predefined by a System Administrator or you may add properties yourself. Each combination of a property name and its value are called a criterion. You must specify at least one criterion. When you find the items that you are looking for, you can save the current search criteria as a view filter for later reuse.

Note:

- The available search options are configured by a System Administrator and may not include all of the options described in the following task.
- When entering search values for a property, separate multiple search values by spaces. Only documents with properties that contain all of the values (AND operator) in any order will be shown. For example, entering **steam turbine** will return documents with the values **steam turbine** and **steam powered turbine**.

  To search for a phrase, enclose the phrase in double quotation marks (“”). For example, entering **“100 MW” steam turbine** will return documents with the values **100 MW steam turbine** and **100 MW turbine**.

To perform a simple search on document properties:

1. In the ribbon menu, click **Search** and then in the ribbon, click **Form Search**.

   The available search options appear. By default, one or more search criteria with empty text boxes might be available. These are configured by a System Administrator.

   - To use a default search property, type a search value in its text box.
   - To search in a different property:

     a. Click the **Add Property** icon ⊕.

     The **Edit Search Properties** dialog box appears. The available properties are configured by a System Administrator.

     b. Select a different property from the list and click **OK**.

     The selected property is appended to the list of search properties.

     c. Type a search value in the new text box.

2. When you are finished specifying search criteria, click **Search**.

   The search results appear in the results pane.

Search In Document Content

Meridian Explorer provides two types of searches: document content search as described in this topic and document property search as described in Search In Document Properties. Document content searches find documents by searching the content of documents for text that you specify.

- If the repository is stored in Microsoft SQL Server, documents cannot be found by content searches for numbers alone. This is a known limitation of Microsoft SQL Server full-text search.
- The following special characters are supported: `, & * = > ? \ [ ] $ ! | - { } ( ) % ~ _ ;`

To search in document content:

- On any view page, in the text box at the top of the navigation pane, type an entire word or the starting characters that you want to find into the **Type text to find here** box and press **Enter** or click the search icon 🔍.

  The results appear in the results pane list.

Search For References

Besides searching for documents as described elsewhere in this chapter, you can also search for other items in the repository that are linked to those documents. This can help you find other information that may be valuable to use with the documents. You may search for linked reference documents (described in this topic) and for linked tags (described in Search For Related Tags).

Reference documents can be:

- Compound document external references such as created by AutoCAD
- Derived documents
- Replaced documents
- Renditions
- Transmittals

To search for references:

1. In the results list of a documents view, select the documents for which you want to find their references.
2. Choose between two options:
   - Right-click over the selection and click **References** in the shortcut menu that appears.
   - In the **Search** ribbon, click **References**.

     The **Referenced Documents** dialog box appears.
3. Click options or type values using the descriptions in the following table.
4. Click **Open**.

   A new window opens with the results of the search. You may then refine the search like any other search.

Reference search options

Option	Description
Find references for	Select whether to search for references linked only to the selected documents or to all documents in the view.
Reference type	Select a reference type from the list that links the selected documents to the documents that you want to find.
Direction	Select whether to search for documents linked to the selected documents or from the selected documents.

Search For Related Tags

Besides searching for documents as described elsewhere in this chapter, you can also search for other items in the repository that are linked to those documents. This can help you find other information that may be valuable to use with the documents. You may search for linked tags (described in this topic) and for linked reference documents (described in Search For References).

The tags that are found by this type of search can be linked in Meridian Enterprise or they can be linked as described in Add And Delete Links To Tags.

To search for related tags:

1. In the results list of a documents view, select up to 50 documents for which you want to find their related tags.
2. Choose between two options:
   - Right-click over the selection and click **Related object tags** in the shortcut menu that appears.
   - In the **Search** ribbon, click **Related object tags**.

     The **Related object tags** dialog box appears.
3. Click options or type values using the descriptions in the following table.

   Related tags search options

Option	Description
Find references for	Select whether to search for references linked only to the selected documents or to all documents in the view.

4. Click **Open**.

   A new window opens with the results of the search. You may then refine the search like any other search.

Advanced Search

Meridian Explorer provides two types of property searches: advanced searches as described in this topic and simple searches as described in Search In Document Properties. Advanced searches let you specify not only the property and values that you want but also matching conditions, Boolean operators, or combinations of criteria. Advanced searching must be enabled by a System Administrator.

You define an advanced property search by specifying one or more properties that you want to search in and a value for each property that you want to search for. Each combination of a property name and its value are called a criterion. You can specify any number of criteria but you must specify at least one. Be default, the criteria are joined by the Boolean AND operator. You may change the operator for any criterion to OR. You may optionally combine the property search criteria with an tag ID to find only those items that are related to a specific tag. When you find the items that you are looking for, you can save the current search criteria as a view filter for later reuse.

The available search options are configured by a System Administrator and may not include all of the options described in the following task.

Notes About Functionality

- If you select a value from a list, the **Equals** operator is always used but if you type a value, the default operator that has been configured by the System Administrator is used. Since the value lists contain complete values (not keywords), this prevents unnecessary **Contains** searches in large repositories, which are slower than **Equals** searches.

  If the value that you type contains an asterisk (*) and the default operator is **Equals**, the **Contains** operator will be used instead so that the wildcard will be evaluated correctly.
- Wildcard characters are supported only by the **Wildcard** and **Not Wildcard** operators.
- If you find that you are getting duplicate search results, add the rootfolderID to your query. The rootfolderID has a unique value for each folder, and will help narrow your search results.

Advanced Search on Document Properties

To perform an advanced search on document properties:

1. In the ribbon menu, click **Search** and then in the ribbon, click **Form Search**.

   The available search options appear. By default, one or more search criteria with empty text boxes might be available. These are configured by a System Administrator.

2. Click the advanced options icon » in the lower-left corner of the navigation pane.
3. Choose one of the following options:
   - To use a default search property, type a search value in its text box.
   - To search in a different property:
     a. Click the **Add Property** icon ⊕.

        The **Edit Search Properties** dialog box appears. The available properties are configured by a System Administrator.

     b. Select a different property from the list and click **OK**.

        The selected property is appended to the list of search properties.

     c. Type a search value in the new text box.
   - To change a search operator, click the current operator and select a different operator from the list that appears.
   - To change how criteria are joined, click the current Boolean operator and select a different operator from the list that appears.
4. When you are finished specifying search criteria, click **Search**.

   The search results appear in the results pane.

Results Pane

The results pane dynamically lists items found by the most recent search or navigation view, or the contents of the current hierarchy folder.

For information on modifying the column layout, sort order, and filtering, see Change the Column Layout.

Show Property Pages for Item

To show the property pages for a particular item:

- Select its row.

Run Command for Item

To run a command for a particular item:

- Right-click anywhere over its row.

  A shortcut menu of the available commands appears. For information about using the commands, see the related topics elsewhere in this guide.

Apply Commands Search Results in Bulk

Open Item in Tab

To open a particular item in a new tab:

- Click its file icon.

  The item's property pages appear in a new window with the **Review** ribbon. For information about using property pages, see Property Pages. For information about using the commands in the **Review** ribbon, see the related topics elsewhere in this guide.

Apply Commands to Explorer Search Results

You can apply some commands in bulk to all documents in your Explorer search results.

1. Choose between two options:
   - From the ribbon:
     a. Select the **Review** ribbon.
     b. Click **Select All**.
   - From the context menu:
     a. Right-click a document in your search results.
     b. Select **Select All** from the menu.
2. Follow the appropriate procedures below.
   - Add to Collection
   - Download Files

     You can apply the following commands in bulk:
     - Download All
     - Download All (Rendition)
     - Download All (Rendition with Redlines)
   - Print Renditions

Scopes

The default data in each view page is determined by the filters that are configured for the view by a System Administrator. Any additional filtering that you perform is called the *scope* of the view.

You apply a scope when you:

- Search within a search result
- Switch search methods from a saved search
- Switch search methods within a project folder
- Search for items related to items in the search result

When a scope is active, it is indicated by a red **Current Filter** bar shown in top of the navigation pane.

Refine a Scope

To refine a scope:

1. Perform one of the searches in the preceding list.

   A dialog box opens, asking you to confirm your choice.
2. Choose between two options:
   - If you click **Yes**, the current scope is added as a level to any previous scope.
   - If you click **No**, the new scope will replace the previous scope.

View Current Scope Levels

To view the current scope levels:

- Click the **Current Filter** bar.

  The **Current Filter** dialog box will show the scope levels that you have accumulated so far.

Remove Current Scopes

To remove the current scopes:

- Click **Remove scopes** and the view will be reset.

Navigate the Results List

The text at the right end of the page control bar in the results pane shows the total number of items in the results list and which of the items are shown in the current page (for example, **1 - 10 of 498**). The text at the left end of the page control bar shows the total number of selected items in the results list (for example, **5 items selected**). The number of items to show on each page is configurable as described in Change the Column Layout.

Choose one of the following options:

- To show the previous or next page of the results list, click the or icon respectively.
- To jump to the first or last page of the results list, click the or icon respectively.
- To refresh the results list (after a repository synchronization has just occurred, for example), click the **Refresh** button .

Change the Column Layout

The columns that are shown in the results pane and their order are configured by a System Administrator, but you can change the column layout to suit your preferences.

> **Note:**
> - Not all columns support filtering and searching.
> - Searching with the SQL wildcard characters (_ or %) will show all documents.

Resize a Column

To resize a column:

1. Hover your cursor over the right end of the column heading until the resize cursor appears.
2. Click and drag the column edge to the desired size and then release the column.

Move a Column

To move a column:

- Click and drag the column heading to the desired location as indicated by the arrow icons and then release the column.

Add or Remove Columns

To add or remove columns:

1. Click the menu button for any column.

   The column menu appears.
2. Point to **Columns**.

   A menu of the available columns appears.
3. Select or clear column names.
4. Click anywhere outside of the menu.

   The results pane refreshes to show the column changes.

> **Note:**
> If you accidentally remove all columns, the view header will be unavailable to reconfigure the columns. To restore the hidden columns, press and hold the Ctrl key and click in the detail pane.

Sort Results List on a Column

> **Note:**
> The properties that may be selected for sorting are configured by a System Administrator.

To sort the results list on a column:

- Click the column heading.

  Click the heading again to reverse the sort order.
- Click the menu button for the column and then select **Sort Ascending** or **Sort Descending** from the menu that appears.

Filter Results List on a Property Value

To filter the results list on a property value:

1. Click the menu button for any column.

   The column menu appears.
2. Point to **Filters**.

   A search keyword text box appears.
3. Enter the name of a value upon which you want to search.

   The document list refreshes dynamically to show you the search results. You may refine your search criteria to obtain the results you want.
4. Click anywhere outside of the menu to complete the search.

   A filter icon appears in the heading of columns that are filtered.

Clear Column Filters

To clear column filters:

1. Click the menu button for any column.

   The column menu appears.
2. Clear the check box next to **Filters**.

   The results pane refreshes to show the filters removed.

Save a Search

Saving a search stores your search filters so that you can return to the same list of items at a later time.

With saved searches, you can:

- overwrite an existing saved search with a new result set
- revise the filters and save the new criteria

To save a search:

1. Search for documents.
2. In the **Search** ribbon, click the **Save** icon .

   The **Save Filter** dialog box appears.
3. Choose between two options:
   - To create a new saved search:
     a. Type a name that will appear on the **Home** page.
     b. Click **OK**.
   - To update an existing saved search:
     a. Select an existing saved search.
     b. Click **OK**.

Delete a Saved Search

Saved searches that are no longer useful can be deleted.

To delete a saved search:

1. On the **Home** page menu, click **Saved Searches**.

   Your saved searches appear in the list.

2. Click the delete icon next to the name of the saved search that you want to delete.

   A dialog box opens, asking you to confirm your choice.

3. Click **Yes**.

   The saved search is deleted.

Property Pages

Every document and tag displays at least one property page named **Properties** in Meridian Explorer. Additional property pages may also be available depending on the document type or tag type and the configuration of the repository. Property pages appear in the detail pane of view pages and in separate detail pages. The property pages may be different or similar for the same items in the Meridian Enterprise source vault and the Meridian Explorer repository. Opening detail pages is mostly useful for conveniently comparing the properties of multiple items.

Detail pages also display the **Review** ribbon that contains the commands that are available for the item. The commands shown in the ribbon are the same commands that are available on the shortcut menu that is shown in the results pane. For information about using the commands in the **Review** ribbon, see the related topics elsewhere in this guide.

Property pages can be of numerous types that display different information about the selected document. The names of property pages are configurable by a System Administrator, which can make the page type and its use unapparent. Descriptions and usage of each type of property page are found in the following topics. For more information about the availability and purposes of custom property pages used by your organization, consult a System Administrator.

Show Property Pages in Detail Pane

To show the property pages of an item in the detail pane:

- On any view page, select an item in the results list.

  The detail pane in the view page (opens if necessary and) shows the item's property pages.

Show Property Pages in Explorer Tab

To show the property pages of an item in a Explorer tab:

- On any view page, click the item's file icon in the first column of the results list.

  The item's property pages open in a new tab in the Meridian Explorer window.
- On any view page, double-click an item's row in the results list.

  The item's property pages open in a new tab in the Meridian Explorer window.

Show Property Pages in New Browser Window

To show the property pages of an item in a new browser window:

1. On any view page, right-click anywhere over the row of a document or tag.

   A shortcut menu of the available commands appears.

2. Point to **Properties** and select **Open in New Window**.

   A new browser window opens and shows the item's property pages. The number of property pages that you can open this way can be limited by the available system resources of your PC. To open additional pages, try closing unused pages first.

General Page

The **General** page is available for every item in Meridian Explorer. It shows the basic information necessary to identify and manage items. Additional property pages are optional.

The following table describes the major features of the **General** property page.

Features of the General property page

Name	Description
Property page bar	Tabs for the available property pages. Click a tab to show its page in the detail pane. If additional property pages are out of view, click the scroll bar buttons to make them visible
Metadata icons	Related information that is available for the current item: • Current workflow status • Redlines • Master/project copy status • Rendition date/time
Thumbnail	A small preview image to help you identify the selected item. Click the thumbnail to open the current item in the viewer. Thumbnails are updated when the repository is synchronized with the Meridian Enterprise vault. For information about when the images are updated in Meridian Enterprise, consult a System Administrator or see *Personal Preferences* for PowerWeb in the *Meridian Enterprise User's Guide*.
Properties	In collapsible property set groups.

Revisions Page

The **Revisions** page lists all of the revisions of the selected item that are available in the repository. If the repository is configured to only contain the latest revision of the items from the Meridian Enterprise source vault, then the list will only contain one revision.

Content Page

A content page is one that shows the different types of content that are available for the selected item. The content category is shown in the **Content Type** column of the page.

The different types of content include:

- **Content**: The native file content that corresponds with the current revision of the item
- **Hybrid**: Meridian Enterprise hybrid document parts
- **Rendition**: Rendition of the native file content that resides in the Meridian Enterprise source vault

Each repository item may comprise one or more of these types.

References Page

A references page is one that shows the other items in the repository that either have references to the selected item (incoming direction) or that the selected item references (outgoing direction). The reference information is shown in the **Direction**, **Name**, and **Type** columns of the page. Additionally, the references are grouped by reference type.

Project Copies Page

A project copies page lists the project copies that have been made from the selected document. Project copies are made in the Meridian Enterprise source vault using the system's Managed Change or Meridian Advanced Project Workflow Module features. If the selected document does not list any project copies on this page:

- The document is not a master document
- The document is a master document but has no project copies
- The document is a project copy of a different master document

The project status column in the results list shows an icon that indicates the project copy type of each document as described in the following table.

Project copy status icons

Icon	Description
	Active project copy
	Master document that has an active project copy
	Project copy that itself has an active project copy
	Project copy that has been released to the master document

Note:
The documents on this page are grouped together by their current project copy status. To easily open the project folder where a project copy resides, see View And Open a Project.

Related Documents Page

The **Related Documents** page shows the relationships between the selected item and other documents or tags. Item relationships are typically only used when the Meridian Enterprise source vault to which the repository is synchronized is integrated with a maintenance management system using the Accruent Meridian Asset Management Module. Related items are grouped together by type.

To view a document related to tag or object:

1. Select the object or tag you want to view the related documents for.
2. Select the **Related Documents** page.
3. Right-click the related document that you want to view.
4. In the context menu that opens, select **Open in viewer**.

   The viewer opens with the document zoomed in on the selected tag or item. If the document contains hotspots, the first hotspot in the list is selected.

Feedback Page

The **Feedback** page shows basic properties about the selected item and a viewer pane. This page allows you to type engineering change request information about the current item and to save that information in the Meridian Enterprise source vault where it can be acted upon by others. This type of page is typically only used when the Meridian Enterprise source vault to which the repository is synchronized is integrated with a maintenance management system using the Accruent Meridian Asset Management Module.

To type engineering change request information:

1. Select a value from **Request type** that most closely matches the type of change request that you are entering.
2. Type text in **Remarks** to describe the change that you are requesting.
3. Click **Update**.

   If enabled by a System Administrator and supported by the file type of the document, you can redline the document and your annotations will be visible in the Meridian Enterprise source vault and vice versa.

Custom Properties Page

A custom property page is one that shows additional property information besides that shown on the **General** page. The page may comprise a viewer pane or thumbnail image and a property grid that is configured by a System Administrator. For more information about the available custom property pages in your system and their usage, consult a System Administrator.

External Pages

An external page is one that shows a web page that resides on a system other than Meridian Explorer. The page is specified by a System Administrator and may show information about the selected item in the repository. When the page is shown inside Meridian Explorer, you can use it just as if it was shown in a separate browser page or tab. For more information about the available external pages in your system and their usage, consult a System Administrator.

Documents

A Meridian Explorer repository is read-only but there are some commands that you can use to work with repository documents in various ways. Some of the commands can be used with a selection of multiple documents.

These methods can also be used to select multiple documents across different pages of a results grid.

Select Multiple Documents in a Range

To select multiple documents in a range of documents:

1. Select the first or last document to include in the selection.
2. Press down and hold the **Shift** key while clicking the opposite document.

Select Multiple Individual Documents

To select multiple individual documents:

- Press down and hold the **Ctrl** key while clicking each document to include in the selection.

View Documents

You can open documents with the viewer from the document name. You can then examine the document with the viewer tools.

Meridian Explorer can use one of the following viewers to show documents:

- Accruent viewer (ActiveX) that is installed on your PC by the Meridian Web Client setup program
- Adobe Reader installed on your PC
- PDFTron server-based viewer can be used to view PDF renditions

The viewer that opens depends on the viewers available to the client computer, the options configured for your system, and the user options you've chosen. You can configure several options to enhance the viewer window.

Notes about Functionality

- Content might not be shown for some documents depending on the configuration your administrator has chosen. Content might also not be available depending on whether a rendition exists in the source vault and whether the rendition is out of date because the source document has been modified.

  To confirm that you are viewing the correct document, view the document and its status in PowerUser or PowerWeb.
- To view the available redline markups for a document, open the **Feedback** page of the document (markups synchronized with the source vault) as described in Feedback Page or view the comments (not synchronized) for the document as described in View Comments.
- In Meridian Enterprise 2021, when the view is set to **View both - default to source** and you select a document then view it with **View in tab**, the document is shown with a viewer, but the bottom pane with opened tabs is invisible.

View a Document from the Results List

To view a document from the results list:

1. Right-click the document name.

   The shortcut menu appears.
2. Click **View**.

   The selected document opens.

View a Document from the General Page

To view a document from the **General** page:

- Click the thumbnail image.

View a Document from a Detail Page

To view a document from a detail page:

- In the **Review** ribbon, click **View**.

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. Click ***your user***.
2. On the page that opens, click **Options**.
3. Select the **Show hotspots** check box.

View hotspots and redlines

To toggle hotspots and redlines on a PDFTron rendition:

1. View the document as described earlier on this page.
2. Select 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
   - name and values of properties configured in Meridian Explorer. 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 tab in the **Documents** view. A rendition is shown if one exists for that target. If no rendition exists, the document properties are shown.

To view the target tag of a hotspot:

1. In the viewer, click the hotspot you want to view.

   The hotspot is highlighted in the current **Documents** view tab. If only one target exists, the target tag of the selected hotspot opens in a new 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 tag opens in a new tab in the **Documents** view.

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.

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.

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 Explorer viewer allows you to print all or selected pages of a document to any Windows system printer. 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.

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 do so, a watermark appears on the printed document.
4. Click **Print**.

Print Renditions

You can select one or more documents in a Meridian Explorer view and print the renditions that exist for the selected documents. You can also opt to download the renditions as a PDF.

You can print PDF documents without renditions. In this case, the native PDF document prints. If the native PDF document has a rendition, such as a signed copy, the rendition prints.

To print renditions:

1. Choose between two options:
   - In the view that lists the documents you want, select the documents that you want to print renditions for.
   - To print renditions for all documents in your search results:
     a. Select the **Review** ribbon.
     b. Click **Select All**.
2. Right-click your selection.
3. In the context menu that opens, select **Print renditions**.

   The **Print renditions** dialog box appears. If one or more selected documents has no rendition, a warning appears and those documents are not listed in the dialog box.
4. Optionally, choose the **Paper size to print/download**.

   The list of documents is filtered to only show the documents with the page size you selected.
5. Select the documents you want to print or download as a PDF.
6. Optionally, select the **Include annotations** check box if you want annotations in the documents to appear in the printed document or downloaded PDF.
7. To download the renditions of the documents as a PDF, click **Download PDF**.
8. To send the renditions to a printer, click **Print**.
9. If the **Print renditions** dialog box opens:
   - To print renditions without annotations using the detected SiteCache local workspace client, click **Yes**.
   - To print renditions via a new browser tab, click **No**.

   Renditions of all selected documents are added to a PDF Portfolio, which is downloaded to the workstation.

View and Reply To Notes

Notes are the text of the text-type annotations described in Annotate Document Renditions:

- 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 Document Renditions

Mark up renditions and suggest changes directly on the document rendition in Meridian Power, Meridian Portal, and Meridian Explorer. Annotations help communicate feedback clearly without changing the original content. Each document supports up to 10MB of annotations. You can also edit existing annotations.

In Meridian Cloud Explorer, annotations are visible in the Meridian Explorer client and in Meridian Power under the **Comments** tab when the document is in the **Masters** or **Documentation** branch.

Master managers can create, update, and delete annotations of other users.

The annotation options displays in your profile language in Meridian Explorer. To change the viewer language, click **Menu** > **Settings** and select another language.

Open viewer

The annotation tools display in the document viewer. The procedure to open the viewer depend on the Meridian client you're using. Select a document that contains a rendition and choose one of the options below:

- In Meridian Power, click **View Rendition**.
- In Meridian Classic Explorer:
    1. Select the **Review** ribbon.
    2. Click **View** or **Open in viewer**.
- In Meridian Cloud Explorer, click the **View the document rendition** icon in the document row.
- In Meridian Portal:
    1. In the **Document Details** pane, click the **Files** tab.
    2. Click **View** next to the rendition file.

Create annotations

1. In the viewer actions menu, click **Edit mode** to display the tool palette.
2. In the actions menu, select a tab:

- **Annotate**: Add text to the document.
- **Shapes**: Draw freehand designs or add shapes.
- **Insert**: Add stamps, signatures, attachments, and more.

3. Select an annotation tool and choose a color.
4. Mark up the document.
5. Adjust your annotation:
   - To undo your last action, click **Undo**.
   - To redo an undone action, click **Redo**.
   - To erase part of a freehand drawing or highlight:
     a. Click **Eraser**.
     b. Click and drag over the area you want to erase.
6. Click **Save**.

   Your annotations are saved when the **Edit mode** button become available again, and your name and redline appear in the **Comments** panel.

Annotation tools

Meridian provides a variety of annotation tools to help you mark up document renditions effectively. You can use these tools to communicate changes, highlight important areas, and attach supplemental information for reviewers and team members.

Annotate tab

Emphasize or comment on a document content with text-based annotations:

- **Underline**: Underlines selected text.
- **Highlight**: Highlights selected text with a background color.
- **Rectangle**: Draws a rectangle to frame areas of interest.
- **Free text**: Adds a text box anywhere on the document.
- **Free hand highlight**: Highlights areas using a freehand line.
- **Free hand**: Draws freehand text, lines, or shapes.
- **Note**: Adds a comment in a specific area of the document.
- **Squiggly**: Underlines text with a wavy line to indicate potential issues or questions.
- **Strikeout**: Strikes through selected text to indicate removal.

Shapes tab

Add graphical elements that draw attention or define areas:

- **Rectangle**: Draws a rectangle to frame areas of interest.
- **Free hand highlight**: Highlights areas using a freehand line.
- **Free hand**: Draws freehand text, lines, or shapes.
- **Line**: Draws straight lines.
- **Polyline**: Draws a series of connected straight lines.
- **Arrow**: Draws an arrow to point to a specific area.
- **Arc**: Draws a curved line.
- **Ellipse**: Draws an oval or circle.
- **Polygon**: Draws a closed shape with multiple straight-line segments.
- **Cloud**: Draws a cloud-shaped border to emphasize content.

Insert tab

Add supplementary content or visual stamps:

- **Rubber stamp**: Applies predefined or custom stamps such as **Approved**, **Sign here**, **Final**, and more.
- **Signature**: Adds a saved or drawn signature.
- **Image**: Adds an external image file to the document.
- **File attachment**: Attaches a file as a reference.
- **Callout**: Adds a label with a pointer to provide explanations or comments.

Delete annotations

Remove annotations that are no longer needed to keep your comments clear and relevant. You can also edit annotations instead of deleting them.

1. In the viewer actions menu, click **Edit mode**.
2. In the **Comments** panel, select the checkbox for the annotation you want to delete.
3. In the **Comments** action bar, click **Delete**.
4. Click **Delete**.

5. Click **Save**.

   Your changes are saved when the **Edit Mode** button becomes available again.

Modify Annotations

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.
4. Click **Save**.

Edit Text Annotation

To edit a text annotation:

1. Double-click the annotation that you want to edit.
2. Edit the text.
3. Click outside the annotation box.
4. Click **Save**.

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 **Comment**.

   The note is highlighted in the **Comments** 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.
3. Click outside the **Style** window.
4. Click **Save**.

Delete Annotation

To delete an annotation:

1. Click the annotation that you want to delete.

   The original bounding box is highlighted.
2. Click **Delete**.
3. Click **Save**.

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 **Comments** panel are highlighted.
   - Type text in the note box of each annotation.
   - Click and drag to move the annotations.
   - Click **Delete**.
3. Click **Save**.

Compare Documents

To compare files, Meridian Explorer 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 file or two similar but unrelated files that you want to compare visually. The areas 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.

Meridian Explorer lets you compare documents in the following ways.

Notes about Functionality

- 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.
- When the documents are loaded, 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.
- 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 documents that reside outside the repository for comparison.

Compare Documents

To compare two different documents:

1. In the results list, select the two documents and then right-click over your selections.

   The shortcut menu appears.
2. Click **Compare**.

   The **Compare** page opens and the documents are loaded side by side.
3. When you are finished comparing documents, click **Cancel** to return to the previous view.

Compare Revisions of Same Document

To compare two revisions of the same document:

1. On the **Revisions** page of any one document, select two revisions and then right-click over your selections.

   The shortcut menu appears.
2. Click **Compare**.

   The **Compare** page opens and the documents are loaded side by side.
3. When you are finished comparing documents, click **Cancel** to return to the previous view.

Compare Project Copy and Master Document

> **Note:**
>
> Project copies are indicated with the project copy icon .

To compare a project copy and its master document:

1. In the results list when viewing project documents, right-click over a document.

   The shortcut menu appears.
2. Click **Compare with Master**.

   The **Compare** page opens and the project copy is loaded side by side with its master document.
3. When you are finished comparing documents, click **Cancel** to return to the previous view.

Compare Page Options

The following table describes the options that are available on the **Compare** page.

Compare page 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.
Print Differences	Prints the graphics in the **Compare Result** pane to a printer.

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, 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.

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.

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**.

Collections

An Explorer collection is a set of documents that are related in some way. Collections can be used for various purposes, reused, and edited. You can use collections with most Explorer commands such as **Draft Print**, **Download**, and **Export**. Collections can be either private to you (default) or they can be shared and edited by other users.

Collections are different from saved searches in one important way. The results of saved searches may change over time as documents are added, changed, or deleted from the repository. The results of a collection do not change and are therefore more useful if you want to always retrieve the same set of (existing) items regardless of any changes to them.

Working with collections is described in the following topics.

View a Collection

Collections appear in Explorer as a type of search view.

To view a collection:

1. In the ribbon menu, click **Collections** and then in the ribbon, click **Collections**.

   The list of existing collections appears in the navigation view pane.
2. In the navigation view pane, click the name of the collection that you want to view.

   The contents of the collection appear in the results pane.
3. To filter the view on a specific item type, in the **Collections** ribbon, click **Show tags** or **Show documents**.

Create And Edit a Collection

You create a collection from a selection of documents. You can also add documents to an existing collection.

Create a New Collection

You cannot create a new collection of the type **Package** using this method. Only empty new packages may be created or an existing collection of documents converted to a package as described in Create a Package.

To create a new collection:

1. In any view, in the results pane, select one or more documents and then in the **Review** ribbon, click **Add to Collection**.

   The **Add to Collection** dialog box appears.
2. In the menu, click **Create New**.

   The collection properties appear.
3. Click options or type values using the descriptions in the following table.

   Collection properties

Option	Description
Name	Type the name of the package as you want others to see it.
Collection type	Select the type of collection that you want to create.

4. In the menu, click **Options**.

   The collection options page appears.
5. Click options or type values using the descriptions in the following table.

   Collection options

Option	Description
Including drawing references	If enabled, includes external references in the collection.

6. Click **OK**.

   The selected items are added to the collection.

Add Documents to Existing Collection

To add documents to an existing collection:

1. Choose between two options:
   - To add one or more documents:
     a. In any view, in the results pane, select one or more documents.
     b. In the **Review** ribbon, click **Add to Collection**.

        The **Add to Collection** dialog box appears.
   - To add all documents in a search result:
     a. In the **Review** ribbon, click **Select All**.
     b. In the **Review** ribbon, click **Add to Collection**.

        The **Add to Collection** dialog box appears.
2. In the menu, click **Existing**.

   The list of shared collections appears.
3. Select the name of the package that you want to add the items to.
4. In the menu, click **Options**.

   The collection options page appears.
5. Click options or type values using the descriptions in the preceding table.
6. Click **OK**.

   The selected items are added to the collection.

> **Note:**
> Creating new documents while viewing a collection also adds the documents to the active collection.

Remove Documents from 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. Right-click over the selected documents and in the context menu, click **Delete from *<CollectionName>***.

A dialog box opens, asking you to confirm your choice.

4. Click **Yes**.

   The selected documents are removed from the collection.

Delete a Collection

Deleting a collection deletes the collection's view. It does not delete the documents themselves.

> **Note:**
> You must be the user who created the collection or a member of a group with administrative privileges.

To delete a collection:

1. Open the collection that you want to delete as described in View a Collection.
2. Next to the collection name, click the **Remove** icon .

   The collection is deleted.

Rename And Share a Collection

> **Note:**
> You must be the user who created the collection or a member of a group with administrative privileges.

To rename a collection:

1. Open the collection that you want to delete as described in View a Collection.
2. Next to the collection name, click the **Rename** icon .

   The **Rename Collection** dialog box appears.
3. Choose one or more of the following options:
   - To rename the collection, type the new name and then click **OK**.

     The collection is renamed.
   - To share the collection, disable the **Private** option and then click **OK**.

     The collection is now public.

Draft Print Documents

Draft printing creates hardcopies of the selected documents on a local printer using the Meridian Explorer viewer. The hardcopies should be considered as draft prints because the output quality is not intended to be equal to that of the native application. The **Draft Print** command is enabled per view by a System Administrator. If the command is not available in a particular view, select a different view or consult a System Administrator. Any redlines or Meridian Enterprise watermarks will also be printed.

Note:

- The default paper size is set in the **RenditionPageSize** property of the document. The default orientation is set in the **RenditionPageOrientation** property of the document.
- If a document has redlines or watermarks, these will also be printed.
- A document row is grayed out if a document has neither a source file or a rendition available because:
  - The rendition or source file does not exist.
  - The view is configured to show renditions only.
  - You do not have the privileges necessary to view the rendition or source document.
- Batch printing is only supported if the **Enable Accruent viewer control** option of the repository has been enabled by a System Administrator and the Meridian Enterprise PowerWeb client components have been installed on your PC by the Meridian Enterprise setup program or if the PDFTron viewer (for PDF documents only) has been enabled by a System Administrator. Otherwise, only draft printing single documents is possible.

To draft print documents:

1. On any view page, select the documents in the results list that you want to draft print.
2. Right-click any selected document and on the shortcut menu that appears, click **Draft Print**.

   The **Draft Print** dialog box appears, showing a list of the selected documents.
3. Set the print options for each document as described in the following table.

   You may select multiple documents to set the options to the same value.
4. Click **Draft Print**.

   The documents are printed using the selected options and the **Draft Print** dialog box closes.

Draft printing options

Option	Description
Print the native document	If enabled, the source document will be printed if one is available, otherwise it will be skipped. If disabled, the rendition will be printed if one is available, otherwise it will be skipped.
Show printer options before printing	If enabled, will open the viewer printing options dialog box so that you can set additional printing options. The dialog box is shown once for each printer that is selected in the same batch.
Print in background	If enabled, allows you to minimize the browser window without affecting printing. If disabled, printing will suspend when the browser window is minimized.

Download Files in Meridian Explorer

Download files from Meridian Explorer to create copies in a location you specify on your computer. Configure the download location.

Prerequisites

- For this command to succeed, you must have a permission level that includes the appropriate permission for the current file, **Download native document** or **Download rendition**.
- You must have permission to access all documents in the batch to download them.
- The download command is not available if you open the repository from Meridian Portal.
- The **Download to Folder** and **Download Rendition to Folder** commands require the Meridian Enterprise Application Integration installation on your computer.

Download files

1. In Meridian Explorer, select the documents you want to download.
2. To download all documents in your search results:
   a. Select the **Review** ribbon.
   b. Click **Select All**.
3. In the **Review** ribbon, select an option:
   - **Download**: Downloads native files.
   - **Download (Rendition)**: Downloads document renditions.

   The files download to your browser.
4. If the **Prompt before download** option is activated, the **Download Documents** dialog displays and shows the destination of the files. Otherwise, Meridian downloads the files to the specified location.
5. Choose one of the following options:
   - To view the contents of the destination folder, click the hyperlink.

     The destination folder is opened in Windows Explorer.
   - To view the current download options, click **Options**.

The **Meridian Upload/Download Control** dialog box appears. To modify the options, continue as described in Configure Options.

- To download the documents using the current options, click **Start**.

  The files are downloaded and other actions might occur depending on the current options.

You can use the **Download (Rendition with Redlines)** option to download the rendition as a single document including redlines.

Export Document Metadata

Exporting document metadata downloads a Microsoft® Excel® workbook that includes a spreadsheet that contains property values for the selected documents. You can open the workbook in a compatible application for viewing, formatting, and printing.

> **Note:**
> The workbook file is saved in Excel 2007 or higher (`.xlsx`) format.

To export document metadata:

1. On any view page, select the items in the results list for which you want to export the property values.
2. Choose between two options:
   - In the **Review** ribbon, click **Export**.
   - Right-click over your selection and on the shortcut menu that appears, click **Export**.

     The **Export** dialog box appears.
3. On the **General** page, click options or type values using the descriptions in the following table.
4. On the **Columns** page, confirm that the columns shown in the right-hand list are the ones that you want to export and that they are in the correct order.

   The layout is the same that was used the last time that you ran the **Export** command.
5. Choose between two options:
   - To configure the column layout to be the same as the results list:
     - Click **Reset**.

       The column layout refreshes to show the layout changes.
   - To configure the columns in a different layout:
     a. Select one or more properties in the left side of the page, or select one or more columns in the right side of the page.

        Press and hold the Ctrl key while clicking to select individual items. You can also press and hold the Shift key while selecting the first and last criterion of a range of criteria.

     b. Click an icon in the center of the page to add or remove columns or to move columns within the list on the right side of the page.

        For a description of each icon, hover your cursor over the icon.
6. Click **Export**.

Your browser's **File Download** dialog box appears.

Your web browser will attempt to download the exported data file to your computer. If your browser's security settings block the download, you might need to adjust the settings and retry this task.

7. Click **Save**.

   If the `.xlsx` file type is registered in Windows with an application, you can click **Open** to open the file immediately without saving it. The exported workbook file downloads to your computer.

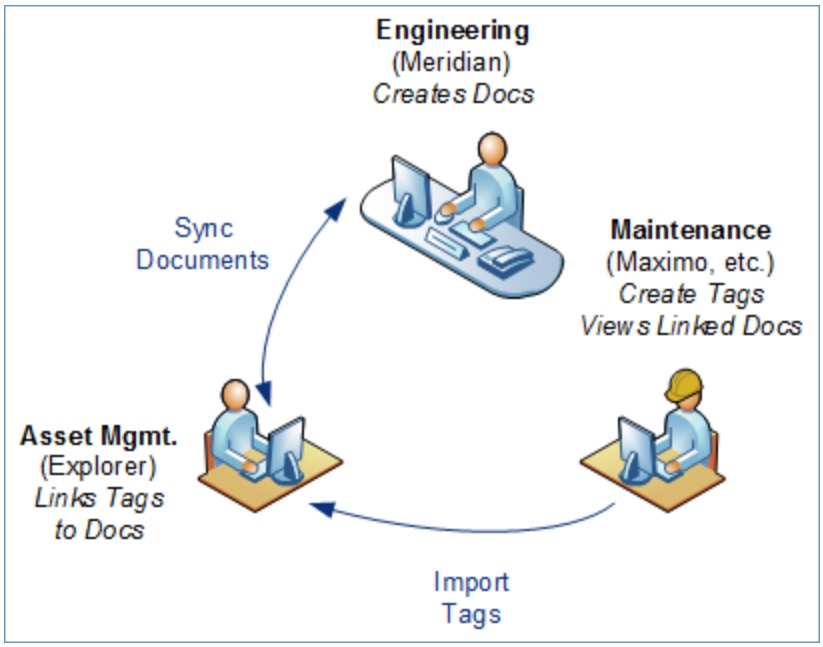
8. Click **Cancel**.

General export options

Option	Description
File name	The name of the exported data file. You will be prompted to select the destination before the file is downloaded.
Export	Select which records you want to export.
Include URL	Select the type of URL to include from the list.

Add And Delete Links To Tags

Linking documents to tags represents the relationships between the documents in the repository and the tags that are managed in a maintenance management system. Tags are available in the repository for linking after they have been imported by a System Administrator as shown in the following figure. The links can be used in the maintenance management system to find and view the repository documents that are related to particular pieces of equipment.



Document synchronization with Meridian Enterprise and tag import from the maintenance management system are managed by a System Administrator.

> **Note:**
> The following commands are not available unless relational searches have been enabled for the Explorer view by a System Administrator.

Add Tag Links

To add tag links:

1. In the results list of a documents view, select the documents that you want to link to the same tags.
2. Right-click over your selection and click **Relate to Tag** from the shortcut menu that appears.

   The **Relate to Tag** dialog box appears.

3. Type part or all of the tag name or number in **Tag name**.

   A drop-down appears that lists the tag names that match your text.

4. Select the tag that you want to link to the selected documents.

   The full tag name appears in **Tag name**.

5. Click **OK**.

   The names of the linked tags appear on the **Related Tags** page of the selected documents, grouped by the tag type.

Delete Tag Links

To delete tag links:

1. On the **Related Tags** page of the document for which you want to delete links, select the tags that you want to unlink from the document.
2. Right-click over your selection and then click **Delete tag relation** from the shortcut menu that appears.

   The links are deleted.

Hyperlink To Items

You can create hyperlinks to repository items in any other application that supports URL addresses. However, because of the design of Meridian Explorer and its ability to store multiple revisions of the same item, creating a hyperlink is not as simple as with the typical website. Copying the current browser address when an item's property pages are visible is not sufficient to hyperlink to the item. Instead, you need a special URL that refers to the specific revision of the item. You can also create hyperlinks to renditions.

The URLs can be one of several types of hyperlinks: to property pages, to open the items in a viewer window, or to download the items.

The URLs can be one of several types of hyperlinks: to property pages, to open the items in a viewer window, to download the items, or to download a rendition of the items.

To use this functionality, the **Enable external hyperlink** setting for the view must be enabled. To learn how to enable this setting, see *Configure the Results Grid Layout* in the *Meridian Enterprise Server Administrator's Guide*.

To hyperlink to items:

1. Choose between two options:
   - Select the items that you want to link to and then in the **Review** ribbon, click **Hyperlink**.
   - Right-click the document's row in the results list and on the shortcut menu that appears, click **Hyperlink**.

     A dialog box appears that lists the selected items.
2. On the menu beneath the item name, click the option for the type of hyperlink that you want to create:
   - To open the property pages of the items, click **Hyperlink**.
   - To open the items in a viewer window, click **Link to content viewer**.
   - To download the items, click **Download**.

     To use this functionality, you must have the **View Source** permission. To learn more, see the *Security Permission Descriptions* article in the *Meridian Enterprise Server Administrator's Guide*.
   - To download the rendition of the item, click **Download Rendition**.

     To use this functionality, you must have the **View Rendition** permission. To learn more, see the *Security Permission Descriptions* article in the *Meridian Enterprise Server Administrator's Guide*.

3. If you want the URLs to always refer to the latest revision of the item, enable **Latest Revision**.
4. To copy a URL to another location:
   a. Click the URL of the item that you want to copy.

      A hyperlink that reflects the options that you have chosen appears at the bottom of the dialog box.

   b. Copy the URL to the Clipboard and paste it into the application where you want to create the hyperlink.
5. To send hyperlinks for all of the selected items in a single email message using the options that you have chosen:
   a. Click **Send Mail**.

      Due to a security limitation in some versions of Internet Explorer, this action can open a new blank tab if Protected Mode is enabled in the browser settings.

   b. Click **Close**.

Packages

A package in Meridian Explorer is a set of documents contained in an archive (ZIP) file. You can use packages to send documents to people who do not have access to Meridian Explorer, for example, as simple transmittals. Packages are to Meridian Explorer what briefcases are to Meridian Enterprise but simpler. However, the two are different and are not interchangeable. A package is similar to a collection in Meridian Explorer and you can work with it in similar ways.

One way that packages are different from briefcases is that 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 Explorer uses the Publisher system links to transfer the documents for you. You only need to select a Publisher job, specify the contents of the package, and instruct Meridian Explorer to send it. The rest is automatic but you can monitor the status of the package to verify that it was sent. You may also view packages that have already been sent and search for documents inside packages.

Create a Package

You can create a package either by:

- Making a new, empty package to which you can add documents that you select.
- Converting an existing public collection into a package. For information about creating a public collection, see Create And Edit a Collection.

In both cases, you select a publishing job to export the collection. The publishing job specifies where and how the package will be created.

You can create a package first and then add items to it or you can first select some or all of the items that you want to include in the package and then create the package.

> **Note:**
> For users who open Meridian Explorer from Meridian Portal, collections are called packages and this is reflected in the user interface. Substitute the word packages for the word collections in the following tasks.

Create New Package

To create a new, empty package:

1. In the view bar, click **Collections**.

   The **Collections** view appears.
2. In the **Collections** ribbon, click **New collection**.

   The **New collection** dialog box appears.
3. Click options or type values using the descriptions in the following table.
4. Click **OK**.

   The package appears in the list of collections.
5. Add documents to the package the same as if it were a collection as described in Create And Edit a Collection.

Package options

Option	Description
Name	Type the name of the package as you want others to see it.
Collection type	Select **Package**. Meridian Portal users can only create **Package** type collections.

Convert Existing Public Collection into a Package

To convert an existing public collection into a package:

1. In the view bar, click **Collections**.

   The **Collections** view appears.
2. In the collections list, right-click the name of the collection that you want to convert and then click **Change to Package** on the context menu that appears.

   A dialog box opens, asking you to confirm your choice.
3. Click **Yes**.

   The **Edit** dialog box appears.
4. On the **Profile** page, click options or type values using the descriptions in the preceding table.
5. On the **Destination** page, click options or type values using the descriptions in Export a Package.
6. Click **OK** to save your changes without exporting the package.

   To save your changes and export the package, see Export a Package.

Link a Package To a Project

By default, packages can contain documents and tags from anywhere in the repository. Linking a package to a specific project, dedicates the package to that project and only items from that project can be added to the package. This can be useful for security reasons, such as to restrict the documents that project team members can include in packages.

> **Note:**
> - Only packages with the status **Open** can be linked to a project.
> - Only empty packages can be linked to a project.

To link a package to a project:

1. Create an empty package as described in Create a Package.
2. In the **Collections** view, right-click the name of the package and then click **Edit** on the context menu that appears.

   The **Edit** dialog box appears.
3. On the **Related Project** page, select a project from the list.
4. Click **OK**.

Add And Remove Items From a Package

You may add items to an existing package or to a new package that you create. You may remove items from a package until it has been sent.

Note:

- Although it is possible to add tags to a package, they are not exported and only documents are supported.
- If a package is linked to a project:
  - The publishing job that is assigned to the package might be configured to only allow items in the project to be added to the package. You can see the name of the linked project on the **Related Project** page of the package properties.
  - If you add a master document to the project when a project copy already exists, the project copy will be added to the package instead.
- The publishing job that is assigned to the package might be configured by a System Administrator to only allow items to be added to the package that can be locked to the package when it is sent to the destination system. That is, only documents that are not already locked.

Add Items to Package

To add items to a package:

1. On any view page, select the items that you want to add to the package.
2. In the **Review** ribbon, click **Add to collection**.

   The **Add to collection** dialog box appears.
3. Choose between two options:
   - To add the items to an existing package:
     a. In the menu, click **Existing**.

        The list of shared collections appears.

     b. Select the name of the package that you want to add the items to.

     c. Click **OK**.

        The selected items are added to the package.
   - To add the items to a new package:

a. In the menu, click **Create New**.

   The collection options appear.

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

c. Click **OK**.

   A package is created and the selected items are added to the package.

Package options

Option	Description
Name	Type the name of the package as you want others to see it.
Collection type	Select **Package**.

Remove Items from Package

To remove items from a package:

1. View the package that contains the items that you want to remove as described in View And Edit a Package.
2. Select the items that you want to remove and then right-click over the selection and select **Remove from <*PackageName*>** from the context menu that appears.

   A dialog box opens, asking you to confirm your choice.
3. Click **Yes**.

   The items are removed from the package.

View And Edit a Package

You may view any package. Only the owner may rename or delete a package. Only the owner or a user with the **Repository Administrator** and **Application Administrator** privileges can delete a package.

View a Package

To view a package:

1. In the view bar, click **Collections**.

   The list of active packages appears, sorted alphabetically by the package name. Packages that have already been sent are indicated by the **Ready** icon ✓ next to their name.
2. Click the name of the package that you want to view.

   The contents of the package appear in the details pane.

The following table describes the icons that are shown for items in the collections list.

Collection icons

Icon	Description
	Private collection This is the only package type that can be created by Meridian Portal users.
	Shared collection
	Package with status **Open**
	Package with status **Sent**
	Package with status **Failed**

Edit Package Properties

To edit the properties of a package:

1. View the package that you want to edit as described in the preceding task.
2. Right-click the name of the package and then click **Edit** on the context menu that appears.

   The **Edit** dialog box appears.

3. If the **Status** property of the package is **Open**, you may edit properties on the **Profile** and **Destination** page.

   If the **Status** property of the package is **Sent**, you may only edit properties on the **Profile** page.

4. Click **OK**.

Download Package Metadata

To prevent you from receiving premature metadata, you may only download the metadata for packages that have been sent.

To download the metadata for a package:

1. Choose between two options:
   - In the **Collections** view, right-click the row of the package for which you want to download its metadata and then click **Download metadata** on the shortcut menu that appears.

     A Microsoft Excel file downloads to your browser where you can open or save it.
   - View the package for which you want to download its metadata as described in the task at the beginning of this topic.
2. In the toolbar, click **Download metadata**.

   A Microsoft Excel file downloads to your browser where you can open or save it.
3. Click **OK**.

Open a Package Sent to Meridian Portal

To open a package sent to Meridian Portal:

- In the **Collections** ribbon, click **Open Package in Portal**.

  The package opens in Meridian Portal in a new browser tab.

Delete a Package

To delete a package:

1. View the package that you want to delete as described in the task at the beginning of this topic.

2. Right-click the name of the package and then click **Delete** on the context menu that appears.

   A dialog box opens, asking you to confirm your choice.

3. Click **Yes**.

   The package is deleted.

Export a Package

Exporting a package adds the documents in the package to the Publisher queue and assigns them to the publishing job that is set in the **Destination** property of the package. You may also specify the name of a recipient to be notified about the package and specify what document content to include in the package.

> **Note:**
> The total size of the package cannot exceed 4 GB.

To export a package:

1. Choose between two options:
   - Convert an existing public collection into a package as described in Create a Package.
   - In the **Collections** view, right-click the name of the package that you want to export and then click **Edit** on the context menu that appears.

     The **Edit** dialog box appears.
2. On the **Destination** page, click options or type values using the descriptions in the following table.
3. Choose between two options:
   - If you do not have sufficient rights to export packages, then in the toolbar, click **Request**.

     The status of the package is changed to **Ready for Export** and any user with sufficient rights can start the export. You will receive an email notification when the package has been sent to the destination.
   - If you do have sufficient rights to export packages, then in the toolbar, click **Send package**.

     The package is exported and you can continue working. Hyperlinks to the transmittal sheet and to the package at the destination appear at the bottom of the page. You can edit, add, or remove the transmittal sheet in the property mapping of the export job.

     The server will perform the following in the background:
     - Create project copies in the source vault of any master documents in the package. If the package is linked to a project in the vault, the project copies are locked to the project if the publishing job is configured to do so.
     - Synchronize the project copies from the vault to the Explorer repository.
     - Replace any master documents in the package with the project copies.
     - Send the package to the destination system.

- If the destination of the package is Meridian Portal, send an email notification to the recipient of the package.

These actions take time and they may need to wait for other jobs on the server to complete before they can start. You can monitor the status of the package as described in View And Edit a Package.

Package destination options

Page	Option	Description
Destination	Recipient	The user names of the people who will be notified about the package.
Destination	Description	Type the description of the package as you want others to see it. If you want to type more than 256 characters, enter them in the **Note** text box on the **Profile** page instead.
Destination	Destination	Select a publishing job from the list with which to export the package and type the reason for the package in the text box.
Destination	Content	Select an option for the document content that you want to include in the package.
Related Project	Select project	Select a project name to which to link the package. Only available when a project has not yet been selected and the package is empty. Required to enable the **Send Package** command.

Send Requested Packages

When a Meridian Portal user that does not have the **Send Packages** permission requests a package of master documents from the Meridian Enterprise vault, a Meridian Explorer user that does have the permission must send the package on that user's behalf. This gives you an opportunity to review the request and either approve it by sending the package or reject the request by not sending it. Sending a package is equivalent to you creating and exporting the package yourself.

You must have the **Send Packages** permission to perform this task.

To send a requested package:

1. In the view bar, click **Collections**.

   The list of active collections appears, sorted alphabetically by name. Packages that have been requested show the status **Ready for Export** in the **Status** column.

2. Click the name of the package that you want to send.

   The contents of the package appear in the details pane.

3. Right-click the name of the package that you want to send and then click **Send package** in the shortcut menu that appears.

   The package is exported in the background and you can continue working.

   > **Note:**
   > If any of the documents fail to export to the package, its **Status** value changes to **Failed** and an icon appears next to the document icon in the file list of the collection. Hover the mouse pointer over the icon to see the corresponding error message.

Close a Package

Closing a package locks the package so that it cannot be changed or resent again. Only close packages when you are certain that you are finished with them.

To close a package:

1. Edit the package that you want to close as described in View And Edit a Package.
2. In the toolbar, click **Close Package**.

   A dialog box opens, asking you to confirm your choice.
3. Click **Yes**.

   The package is closed.

Import With Packages

An import package is a set of documents or asset information and an accompanying MS Excel workbook that contains metadata about the items in the package. Import packages support external references, hybrid documents, multiple revisions of the same document, and drawing title block data exchange.

Packages can be exported from Meridian Explorer as described in Export a Package. Packages can also be imported into a Meridian Enterprise vault from Meridian Explorer or automatically from a Meridian Portal tenancy. The (export) packages can be created by Meridian Explorer, manually by users, by Meridian Portal, or by some other system and sent to Meridian Enterprise Server.

You import packages into Meridian Enterprise according to a set of rules called an *import profile* that is created by a System Administrator. Different import profiles can be configured for different sources, destinations, or purposes for the packages.

Meridian Enterprise Server lets you see how documents will be imported before the import is actually performed. You do this by scanning the package. This lets you verify the import configuration before any changes are made in the destination vault.

Meridian Enterprise Server scans and imports packages in the background, which lets you continue working. You can monitor the progress of an import at any time.

The following table lists the minimum steps for importing a package and the corresponding topics in this guide that describe each step in more detail. The steps are listed in the order that they should be performed.

- A Meridian Explorer repository and a Meridian Explorer client license must be available to work with import packages.
- The **Enable Advanced Project Workflow Module** option of the source vault must be enabled for the **Export Packages** and **Import Packages** property pages to appear in the Meridian Enterprise clients.

Package import steps

No.	Step	Topic
1	Collect the documents into a folder or in an archive (ZIP) file that you want to import.	Consult a System Administrator
2	Create an MS Excel workbook file that includes a worksheet that contains the metadata that you want to import.	Create an Import Profile
3	Create a copy of the workbook file with empty rows to serve as a template for the metadata.	Consult a System Administrator

No.	Step	Topic
4	Create an import profile to specify how you want Meridian Enterprise Server to import the metadata and the documents.	Create an Import Profile
5	Create a new, open package to associate the source documents, metadata, and import profile together for import.	Create an Import Package
6	Start the scanning process.	Scan an Import Package
7	Review the scan results and adjust the import actions as necessary.	Scan an Import Package
8	Start the package import process.	Import an Import Package
9	Close the package to indicate that it has been completed.	Import an Import Package

Depending on the outcome of the scanning or import processes or for business reasons, you might want to repeat, abort, or skip steps. The preceding steps and the available commands for each step are shown in Route an Import Package and are available in the toolbar.

Import packages are designed so that these steps can be performed by different users who may have separate responsibilities for documents in your organization. For example, one user (such as a System Administrator) might be responsible for creating import profiles; a second user (such as a project team member) for creating, scanning, and importing packages; and a third user (such as a project leader) for approving packages before they are imported and for closing packages. Processes like this can be supported by the security privileges described in Create an Import Profile.

Create an Import Profile

You begin to import a package of documents or assets by creating an import profile. An import profile specifies the rules to apply when you import the package into a vault. Only after you create an import profile can you import a package with that profile.

- You must be a member of the **Import Profile Managers** role to perform this task.
- The destination vault must be registered in Meridian Enterprise Server as described in Registering a Meridian Enterprise vault.
- Options that specify a property name can accept either the internal name or the display name of the property.

To create or edit an import profile:

1. In Meridian Enterprise Server Administration Console, in the **Data Exchange** group, click **Import Profiles**.

   The **Import Profiles** page appears and lists the existing import profiles.
2. Choose between two options:
   - To create a new import profile:
     - Click **New**.

       The **Overview** page of the new import profile appears.
   - To edit an existing import profile:
     - Click the icon of the import profile that you want to edit.

       The **Overview** page of the import profile appears.
3. Click options or type values using the descriptions in the following table.

Import profile properties

Group	Property	Description
General	Name	Type a descriptive name for the import profile. We recommend that the name refer to the source of the package contents and to the destination of the documents.
General	Description	Type a detailed description of the import profile (500 characters maximum).

Group	Property	Description
General	Use Meridian Portal	If enabled, a Meridian Portal tenancy can be configured as the source address when the import profile is configured after it has been created. **Important!** There should only be one import profile that has the **Use Meridian Portal** setting enabled per vault.
Source Address	Meridian Portal tenancy	Shows the name of the Meridian Portal tenancy to which the Meridian Enterprise Server is connected as described in Viewing and editing the connectivity settings.
Source Address	Address	If **Use Meridian Portal** is disabled, the location of an archive file that contains the items that will be imported by this profile. This address can be specified as a UNC path or as a URL address (HTTP, HTTPS, FTP, FTPS). If the address is a URL path, the system will look at this location for an archive (ZIP) file with the same name (and no extension) as the metadata of the package. If the address is a UNC path, an option labeled **Use content from a folder** is available when the package is made that can be enabled to indicate that the documents are contained in a sub-folder with the same name (and no extension) as the metadata file in the package. If the folder is not found, the system will look for an archive (ZIP) file with the same name. If a folder or archive file name that is different than the metadata filename is specified when the package is created, the system will look for that name first.
Source Address	User name	Name of an account with read access to the location specified in **Address**. This option is only available when importing an archive file from a file system. This account is only used for that purpose. The account of the user that performs the import is used to import the documents.
Source Address	Password	Password for the account specified in **User name**. This option is only available when importing an archive file from a file system. Click **Test** to test the user name and password for the location specified in **Address**.

Group	Property	Description
Source Definition	Template	Not applicable to Meridian Portal. An existing MS Excel workbook file that contains one or more worksheets of columns only. The columns specify the property names of the metadata to import from the packages to which this import profile will be assigned. For information on creating this workbook, see Create a Property Mapping Template. To provide a metadata template: a. Click **Upload**. The **Upload Template** dialog box appears. b. Click the **Browse** icon . The **Choose File to Upload** dialog box appears. c. Select the workbook file that you want to upload and then click **Open**. d. Click **Upload**. The page refreshes to show the **Key Columns**, **Miscellaneous**, **Property Mapping**, and **Permissions** pages.
Source Definition	Document table	Not applicable to Meridian Portal. Name of the worksheet in the workbook file specified for **Template** that contains the item metadata columns.
Source Definition	Reference table	Not applicable to Meridian Portal. Name of the worksheet in the workbook file specified for **Template** that contains the reference file metadata columns for the items in the packages.
Destination repository	Destination repository	The destination vault for the items that are imported from packages to which you assign this import profile. Only the projects in this vault are valid destinations.

Group	Property	Description
Destination repository	Destination folder	Vault folder where to import the items. The default is the root folder. If **Import into project** is enabled and the **Project number property** option below is set, each project will be imported as a sub-folder of this parent folder. This location will be overridden if: • A path is specified in the column in the import package metadata that is mapped to the **Import folder** option on the **Key Columns** page of the import profile. • The item already exists in this folder and a folder is specified for the **Duplicates folder** option of the import profile.
Destination repository	Duplicates folder	Vault folder where to import duplicate items if they already exist in the folder specified for **Destination folder**. This option is not used when importing packages from Meridian Portal.

Group	Property	Description

Destination repository	Document number property	Fully qualified Meridian Enterprise property definition name that holds the primary identifier for every item in the vault. This property is used to determine if an imported item already exists in the vault.
		• These are the rules (in priority order) that are used to determine if an item already exists and should be superseded by an imported item:
		  ○ Item with the same **GlobalID** value.
		  ○ Item with the same value for this property that resides inside the project folder. This is the only rule that is applied to items imported from Meridian Portal. Therefore, this option must be set if the vault will exchange items with Meridian Portal through Meridian Explorer (scripted integration). This option is not used for item exchange directly with Meridian Portal project repositories.
		  ○ Item with the same value for this property that resides outside the project folder.
		  ○ Item with the same value for this property that resides in the folder calculated by the vault's Field-Path definition (if configured) using the property mapping template described in Create a Property Mapping Template.
		• If no matching item is found in the destination project, the item is imported as a new item in the project. If a name conflict occurs with an existing item, an incremental number is appended to the imported item name (for example, `MyDrawing (1).dwg`.
		• If this property is empty during synchronization, the filename (without extension) is used to identify the items.
		To specify the property name:
		a. Click **Edit**.
		The **Select Property** dialog box appears.
		b. Select a vault property from the list.
		Typically, you should select the **Name** property in the **Common** property set.
		c. Click **OK**.
		The property name appears in the option field.

Group	Property	Description
Destination repository	Project number property	Fully qualified Meridian Enterprise property definition name that holds the destination project number. Read-only if set in the vault registration described in Managing a Meridian Enterprise vault. This property is matched to the values contained in the **Project Number** column of import package metadata files as described in Import with packages.
Destination repository	Default document type	Document type to assign to the imported items if no document type is specified in the **Property Mapping** options. If the **Document type workflow** option of the document type is set to **Use workflow definitions**, the **After importing documents** option of the vault should be set to **Set state to Under Change**. After import, the items will be in the Released workflow state depending on the configuration of the document type and of the vault. If the items cannot be released, they will be left in the Under Change state for the user that performed the import and the reason that they could not be released will be entered in the publishing log.
Destination repository	Default reference type	Reference type to assign to the imported items if no document type is specified in the **Property Mapping** options.

4. Choose between two options:
   - If you are creating a new import profile, click **Save**.

     The page refreshes to show additional options.
   - If you are editing an existing profile, click **Key Columns**.

     The **Key Columns** page appears. This step does not apply to Meridian Portal, skip to step 6. These options specify the columns in the package metadata to map to the most important Meridian Enterprise properties. The metadata should contain columns for all of the following options that apply to the source items.

     The available values for these options are only the column names that were found in the worksheet specified for **Document table** in the workbook that you uploaded for **Template**. Any columns in excess of those that are mapped to these options are considered as custom properties and they can be mapped on the **Property Mapping** page.

     All properties that are mapped in the import profile must exist in the metadata of the import package or the import will fail.
5. Click options or type values using the descriptions in the following table.

Key mapping properties

Group	Property	Description
Document Key Columns	Document number	The column that contains an identifier that is unique for each item (including the parts of assemblies). This number should be the same for all revisions of the same item and the same for project copies of master documents.
Document Key Columns	Document name	The column that contains the item name as it should appear to users.
Document Key Columns	Document type	The column that contains the document type to assign to the imported items.
Document Key Columns	Revision	The column that contains the item revision number. This must be unique for all revisions of the same item. Text field that accepts any revision numbering scheme. Enter the order of revisions in the **#** column. Rows with the same value for **Document Number** and for **Revision Number** are imported as hybrid documents by default. If you want to import rows with the same value for **Document Number** and for **Revision Number** that are distinct revisions but not hybrid drawings, enter an index prefix with the **Revision Number** value in the form n::*<RevisionNumber>* where n starts at 1, is applied to the first duplicate revision and is incremented for successive revisions. For example: First revision=A Second revision=1::A Third revision=2::A
Document Key Columns	Revision sort	The column upon which to sort the revisions for a single item (if present) so that they are imported in the correct order. Typically, this is the same column as **Revision field**.
Document Key Columns	Hybrid sort	The column to sort to identify the main document (imported first) and the parts (imported next) of hybrid documents.
Document Key Columns	Path	The column that contains the path to the content of the items. This location must be relative to the location specified for **Address**. If two rows in the spreadsheet contain the same filepath for a document, scanning will fail and an error will be returned.

Group	Property	Description
Document Key Columns	Rendition path	The column that contains the relative path to a rendition of the document. This location must be relative to the location specified for **Address**.
Document Key Columns	Import folder	The column that contains the names of folders where to import the items. The values in this column override the **Destination folder** option on the **Overview** page.
Document Key Columns	Workflow state	The column that contains the workflow state names for the items in the destination vault. • The synchronization job for the destination vault must have the **Publish draft revision** option enabled as described in Configuring synchronization options. • If this column is empty for an imported item or contains an invalid value, the item will be imported to the **Released** state. To set a different destination workflow state, specify it in the **Workflow State** column of the source metadata file described in Create an Import Package.
Reference Key Columns	Source document number	The column that contains the item number that is the source of the references.
Reference Key Columns	Destination document number	The column that contains the item number that is the destination of the references.
Reference Key Columns	Source revision number	The column that contains the revision number of the item that is the source of the references.
Reference Key Columns	Destination revision number	The column that contains the revision number of the item that is the destination of the references.
Reference Key Columns	Reference name	The column that contains the names of the references to create between the items.

Group	Property	Description
Reference Key Columns	Reference type	The column that contains the names of the reference types to create between the items. The supported reference types are: • AutoCAD Drawing Sheet Reference • AutoCAD External Reference • AutoCAD Overlaid Reference • AutoCAD Raster Image Reference • AutoCAD Underlay Reference • Client Reference • MicroStation Model Reference • MStation RasterRef • MSExcelReference • MSPowerPointReference • MSWordReference • TagObjectReference (supported only between tags and from a document to a tag)

6. In the menu, click **Miscellaneous**.

   The **Miscellaneous** page appears. These options specify how you want Meridian Enterprise Server to perform the import.

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

Miscellaneous options

Group	Option	Description
Scan Options	Import title blocks	If enabled, searches imported files for title blocks that are specified in the vault configuration and if any are found, sets the corresponding item properties. • The **Perform automatic title block updates** option and the **When the document is imported** option of the document type must both be enabled. • Only when a title block property is specified in a title block link configuration of the vault and it is also mapped to a column in the import metadata will the title block property values be imported to the items. The import metadata will not be imported. • Title block properties are only imported after a item is successfully imported into a vault, not during package scanning. • Title block synchronization during package import has the same requirements and limitations as during normal application link operations in Meridian Enterprise. For example, Meridian Enterprise Server must run under the same account as was used to install the native application (Autodesk Inventor, SolidWorks, and so on) that provides the libraries that are used to perform the synchronization. • Any errors that occur during title block synchronization will appear in the **Comment** log of the item and will not cause the import to fail. For more information about configuring title block links, see *Configure Title Block Updates* in the *Meridian Enterprise Configuration Guide* .
Scan Options	Include references	If enabled, scans imported files for external references and creates corresponding Meridian Enterprise references. These references are in addition to the references created by the worksheet specified for the **Reference table** option. If an external reference is missing from the package, an error will be logged and the parent item will be skipped. To use this feature, **Site Cache Mode** must be enabled. For more information about Site Cache Mode, see the *Personal Preferences* section of the *Meridian Enterprise User's Guide*.
Scan Options	Create thumbnails	If enabled, generates thumbnail images of items during import.

Group	Option	Description
Scan Options	Stop on validation error	If the check box is selected, when you scan the import package and there are validation errors in that import package, it cannot be imported and an error message is shown in the **Status** field.
Import Options	Existing documents	Specifies how to process items that already exist in the destination folder in the vault. If this option is set to **New revision** and a source vault item is in a custom workflow but not in the **Released** state when the item is imported back to the vault from Meridian Portal, the import will fail. If this happens, change the state of the vault item to **Released** and restart the import job.
Import Options	Match in	Specifies how the system should check if a document number is unique. There are two options: • Target Project: Checks if the number is unique within the target project • Entire Vault: Checks if the number is unique within the entire vault This setting is only available for import profiles that are not used for Meridian Portal.
Import Options	Missing content	Specifies how to process items for which a content file could not be found in the sub-folder or archive file at the location specified in **Address**.
Import Options	Release new documents by default	Specifies if the workflow status is not set for a document in the metadata worksheet, then Meridian will: • (disabled) Leave document in its current workflow state For example, if the document was Under Change, it stays in the Under Change state. • (enabled) Release the document from the workflow entirely The document is no longer in a workflow, and becomes a new version.
Notification	Notify if failed	If enabled, the members of the selected group are notified when an import package fails.

Group	Option	Description
Notification	Recipients	The name of the group to receive notifications when an import package fails. To select a different group: a. Click **Change**. The **Configure Recipients** dialog appears. The currently selected group appears in **Recipients**. b. Click **Add recipients**. The **Add Groups** dialog appears. c. Select a group from the list and click **OK**. The newly selected group appears in **Recipients**. d. Click **Change**. The name of the group to receive notifications is updated.

8. In the menu, click **Property Mapping**.

   The **Property Mapping** page appears. These options are supplemental mappings of vault properties to custom properties that can be included in the item metadata worksheet.

9. Create a mapping for each column in the metadata that you want to import as a item property in the vault.

   For each mapping, click options or type values using the descriptions in the following table.

   - All values in the metadata are read as text.
   - Only select destination properties of the correct data type for each column.
   - Null values for String, Memo, and RTFMemo data types in the metadata are converted to empty strings in the mapped vault properties, when possible.

Property mapping options

Group	Option	Description
Target	Initialize property on import	If enabled, the property will be set for the item in the vault with the value specified by the other options that you select. If disabled, the property will not be set during import.
Target	Validate property on import	If enabled, the value specified in the metadata will be evaluated by the **Input required** and **Apply input restrictions** validation options that are configured in the destination vault just as if the item were created new in the vault.

Group	Option	Description
Source	Fixed value	If selected, sets the property to the value specified in **Fixed value**.
Source	Database field	If selected, sets the property to the value specified in the metadata column selected from the list.

Source	Expression	If enabled, evaluates an expression to calculate the value of the mapped property.
		To specify the expression:
		a. Click **Edit**.
		The **Expression** dialog box appears and lists the available properties in the source system.
		b. In the **Expression** pane, type an expression to be evaluated during import.
		The expression may use any .NET compliant methods (except **Parse**) and operators in the C# language syntax. The result of the expression will be the property value in the destination system. Double-click a property in the list to insert it into the expression. The result of the expression must be compatible with the data type of the destination property. If necessary, you can convert data types, for example, using the **ToString** method.
		Following are examples of text and date expressions:
		`{Title 1} + " " + {Title 2} + " " + {Title 3}`
		`{PropertyName}.SubString(0, 1)`
		`{NonStringProperty}.ToString() + " days"`
		`{ProjectEndDate}.AddDays(-30)`
		c. To validate the expression, click **Check**.
		Errors in the expression appear in the **Errors** pane. Correct all errors until the **Errors** pane is empty.
		d. When you are finished editing the expression, click **Save**.

10. In the menu, click **Permissions**.

    The **Permissions** page appears. These options specify which security groups can perform various actions with import packages that have been assigned this import profile.

Permissions options

Group	Option	Permission
Administrative Permissions	View	See packages.
Administrative Permissions	Create and edit	Create and edit packages.
Administrative Permissions	Scan	Start scanning of packages.
Administrative Permissions	Approve	Approve scanned packages.
Administrative Permissions	Import	Start the import of packages.
Administrative Permissions	Close, reopen, delete	Close, reopen, and delete packages.
Administrative Permissions	Configure import profile	View and configure the import profiles you have the privilege for.

11. Click **Save**.

Export And Import Profiles

After you have created an import profile, you can export it from one computer (a test or development server, for example) and import it to another computer (a production server, for example).

Export Import Profile

To export an import profile:

1. In Meridian Enterprise Server Administration Console, in the **Data Exchange** group, click **Import Profiles**.

   The **All Import Profiles** page appears and lists the existing import profiles.
2. Click **Export**.

   The **Export Package Profiles** dialog box appears.
3. Select the profiles that you want to export and then click **Export**.

   The file `ImportProfiles.zip` is downloaded by your browser and you are prompted for what to do with it.
4. Save or open the file.

Import Import Profile

To import an import profile:

1. In Meridian Enterprise Server Administration Console, in the **Data Exchange** group, click **Import Profiles**.

   The **All Import Profiles** page appears and lists the existing import profiles.
2. Click **Import**.

   The **Import Package Profiles** dialog box appears.
3. Click the folder icon .

   The **Open** dialog box appears.
4. Navigate to and select the compressed archive file (the default is `ImportProfiles.zip`) that you want to import and then click **Open**.

   The filename appears in the **Package profiles** field.

5. Click **Upload**.

   The file is uploaded by your browser and then the **Import Profiles** dialog box appears and lists the profiles that were found in the file.

6. Select the profiles that you want to import.
7. Click **Import**.

   The profiles are imported.

Create a Property Mapping Template

An import profile property mapping template is a MS Excel workbook file that contains one or more worksheets of columns for the system to look for in the metadata workbooks of the import packages. The worksheets should contain columns only and no rows. They make it easier for you to specify the property names of the import metadata instead of you having to enter the metadata fields manually in the import profile. The import data itself (rows) are provided in similar metadata workbooks of the import packages. You can download a copy of a property mapping template to give to others to fill with the document metadata to import.

The property names that are specified in the columns in the template will be shown in lists in the import profile. You select properties from these lists to map to the corresponding Meridian Enterprise properties where you want to import the metadata.

Supported Data Types

It's important that the metadata to import is saved in the workbook with the correct data types to match the destination vault property data types. Meridian Enterprise Server supports the following data types in the metadata cells:

- Text
- Number
- Date/Time
- Boolean

During import, Meridian Enterprise Server converts the data type found in the template to the correct data type of the destination property.

General Requirements

Review and note the following requirements pertaining to property mapping templates.

- The **References** tab in the spreadsheet is mandatory.
- The template must contain at least one worksheet and its name must be specified in the **Document table** option.

  At a minimum, it should contain the applicable columns that are listed in the **Document Key Columns** group on the **Key Columns** page.
- If you want to import additional properties, provide one column for each property in this worksheet and map them to the vault properties on the **Property Mapping** page.

- If the documents listed in the worksheet specified for **Document table** contain references to other files in the import package and you want to create corresponding Meridian Enterprise references for them in the vault as they are imported, the workbook file must also contain another worksheet and its name must be specified in the **Reference table** option.

  At a minimum, the worksheet should contain the applicable columns that are listed in the **REFERENCE KEY COLUMNS** group on the **KEY COLUMNS** page.
- If the **Rendition Format** field is not included as a column, the extension of the rendition file will be used to set the rendition format.
- If the **File Type** field is not included as a column, the file type will be set as the uppercased extension of the document name, concatenated with the word "File".

  For example, the file type for the file ABC123.dwg would be "DWG File".

Requirements for Portal Import Packages

The following requirements are specific to import packages which will be imported to Meridian Portal.

- For metadata that will be used with the Meridian Portal hierarchical lookup properties **Discipline** or **Classification** that have corresponding code properties, specify the full property name and values.

  The matching code properties will be set accordingly during import.
- Custom properties defined in Meridian Portal will be automatically included in the import profile that is exported as described in Export And Import Profiles.
- For properties that allow the selection of multiple values, the values must be enclosed by two separators, and each value must be separated by a separator.

  The default separator is an asterisk, but you can also use a different separator. To learn more, see the *Create And Edit Custom Properties* article in the *Meridian Enterprise Configuration Guide*.

  For example, if you were using the default separator, the format of the property values would be: ***Option1*Option2*Option3*** .

Create an Import Package

You create a new import package to upload items from your PC or from a network location to a vault. You must have the **Create and edit** permission in the import profile that you want to assign to this package in order to perform this task.

The default behavior is for the package source folder to be copied to the temporary folder of the service account in Meridian Enterprise Server. Administrators can change this behavior.

To change this behavior, create this .dat file:

```
%ProgramData%\BlueCieloECM\EnterpriseServices\ImportPackageOptions
.dat
```

with this content:

```
{"DoNotDownloadFromFolder":true}
```

To create an import package:

1. On the home page, in the right sidebar, click **Import Packages**.

   The **Import Packages** page appears.
2. In the toolbar, click **New** or in the app bar, click **New**.

   The **New Import Package** dialog box appears.
3. Click options or type values using the descriptions in the following table.
4. Click **OK**.

   The spreadsheet and source items are uploaded to Meridian Enterprise Server and will be imported using the options that you selected.

New package options

Group	Option	Description
Identification	Source metadata (.xlsx)	Local MS Excel workbook file that contains metadata for the items in the package. The rows in this file will be assigned to the imported items according to the options set in the import profile that you specify for **Import Profile**. This file must include at least one worksheet that contains the metadata for the items. The name of the worksheet must be specified in the **Document table** option of the import profile. If this column is empty for an imported item or contains an invalid value, the item will be imported to the **Released** state. To set a different destination workflow state, specify it in the **Workflow State** column using this syntax. • **SDWF:*<StateName>*** for standard document type workflows. For example: **SDWF:DWFS_RELEASED** • **CWF:*<WorkflowName>.<StateName>*** for custom workflow definitions. For example: **CWF:cwfBasic.Approve** The valid standard document type state names are: • DWFS_RELEASED • DWFS_INITIATED • DWFS_REFUSED • DWFS_ASSIGNED • DWFS_UNDERCHANGE • DWFS_SUBMITTED • DWFS_INREVIEW • DWFS_REJECTED • DWFS_APPROVED • DWFS_WORKINGCOPY • DWFS_UNCHANGED • DWFS_RETIRED Unlisted or invalid state names will not be imported; the document status will be blank. If the items listed in the worksheet contain references to other files in the package or in the vault and you want to create corresponding Meridian Enterprise references for them in the vault as they are

Group	Option	Description
		imported, the workbook file should also contain a worksheet of reference data. The name of this worksheet must be specified in the **Reference table** option of the import profile. The items (including revision numbers) specified in each row of the reference worksheet must have corresponding rows in the items worksheet. For more information about the structure of this file, see the description of the **Template** option in Create an Import Profile. To provide a metadata file: 1. Click the **Browse** icon . The **Open** dialog box appears. 2. Select the workbook file that you want to upload and then click **Open**. The name of the selected file appears in the text box.
Identification	Package name	The name of the package as you want it to appear to users.
Identification	Description	The description of the package.
Import Profile	Import Profile	Name of the import profile with which to process the package. The package can only be imported to projects in the vault that is specified for the **Destination vault** option of the import profile. For information about creating import profiles, see Create an Import Profile. To download a metadata spreadsheet template that contains all of the necessary worksheets and column definitions that are specific to your environment, ready for you to add the metadata values, click **Download XLSX Template** button and save the file somewhere on your PC.
Source Files	Source archive (ZIP)	Local or network folder or archive file name (excluding extension) that contains the items in the package. This name (or relative path) is appended to the location specified for **Address** in the import profile that you specify for the **Import Profile** option. To validate the import profile and the source archive: • Click the **Test** icon . The icon changes to show the results of the validation. A tooltip shows details of the validation. If the source files are contained in a sub-folder instead of an archive file, enter the folder name and enable **Use content from a folder**. If you only want to import the metadata and no files (such as for asset tags), enable **Process the package without document files**.

View And Edit an Import Package

You can view the configuration of import packages, their contents, and their import status. You can change a limited number of the properties of an existing import package.

You must have the **View** permission in the import profile that is assigned to this package in order to view the package. You must have the **Create and edit** permission in the import profile that is assigned to this package in order to edit the package.

1. In the right sidebar, click **Import Packages**.

   The **Import Packages** page appears. The packages that are listed depends on the status filter that is selected in the left menu.

2. To filter the package list to show only import packages with a different status, click a filter in the menu.

   The page refreshes to show only the import packages with the selected status.

   The columns of this page show the information described in the following table.

Import packages view columns

Column	Description
Name	Name of the import package as specified by its creator.
Status	Current import status of the import package. The possible values are: • **Aborted**: Import stopped by a user • **Closed**: Closed by a user • **Imported**: Has been imported as described in Import an Import Package • **Import Failed**: Import stopped by the system due to an error • **Importing**: Currently being imported into the vault • **Ready For Import**: The system has verified that the user account and password specified in the import profile can access the source of the items • **Received**: Created but not yet imported • **Scanned**: Has been scanned as described in Scan an Import Package • **Scanning**: Currently being scanned • **Scanning Failed**: Scanning stopped by the system due to an error The icon of the import package indicates its status graphically.

Column	Description
Profile	Name of the import profile assigned to the import package.
Meridian Vault	Name of the vault specified in the import profile to which to import the contents of the import package.
Received	Date the import package was received by Meridian Enterprise Server.

3. To view detailed information about a package:
   - Click the row of the import package that you want to view.

     The properties of the package appear read-only in the right pane. Each property is described in the following table.
4. To edit or process a package:
   - Click the icon of the import package.
   - In the toolbar, click **Open**.

     The **Overview** page of the import package shows the properties described in the following table. Depending on the current state of the import package, some of the properties may not be visible. You may only edit the properties in the **General** group.

     The current state of the package in the overall import workflow is highlighted in the time line at the top of the page.

Import package properties

Group	Property	Description
General	Name	Name of the import package.
General	Description	Description of the import package.
General	Import Profile	Name of the import profile assigned to the import package. To view and edit the assigned import profile: • Click **Manage**. The **Overview** page of the import package opens, where you can change it as described in Create an Import Profile.
Imported	Updated documents	The number of items in the destination vault that were updated by the import package.
Imported	New documents	The number of new items created in the destination vault.

Group	Property	Description
Imported	Failed	The number of items in the import package that failed to import.
Scanned	Scanned	The number of items that were scanned successfully.
Scanned	Document rows	The number of rows found in the package metadata that can be scanned.
Scanned	Matching documents	The number of items in the destination vault that match the metadata in the package.
Scanned	New documents	The number of new items that will be created by package.
Scanned	Skipped	The number of rows in the metadata that were skipped due to property validation or other errors.
Received	Source metadata	MS Excel workbook file that contains metadata about the items in the import package. The column data in this file will be assigned to the imported items. For information about the structure of this file, see Create an Import Profile. To download a copy of the metadata: • Click **Download**. The file downloads to your browser.
Received	Source address	Source of the item content files to import with the metadata.

5. To change any of the properties in the **General** group:
   a. Click **Edit** in the **General** group.

      The **<PackageName>** dialog box opens, where you can change the available properties.

   b. Click **Save**.
6. To view the metadata of the items in the package:
   - In the menu, click **Documents**.

     The **Documents** page for the import package appears and shows the metadata contained in the MS Excel worksheet for each item of the import package.
   - To sort, rearrange, or filter the data in the columns, see Change the Column Layout.
   - To view all of the system and metadata information for a particular item, select the item in the list.

     Its details appear in the right pane.

Change the Column Layout

The columns that are shown in the results pane and their order are configured by a System Administrator, but you can change the column layout to suit your preferences.

> **Note:**
> - Not all columns support filtering and searching.
> - Searching with the SQL wildcard characters (_ or %) will show all documents.

Resize a Column

To resize a column:

1. Hover your cursor over the right end of the column heading until the resize cursor appears.
2. Click and drag the column edge to the desired size and then release the column.

Move a Column

To move a column:

- Click and drag the column heading to the desired location as indicated by the arrow icons and then release the column.

Add or Remove Columns

To add or remove columns:

1. Click the menu button for any column.

   The column menu appears.
2. Point to **Columns**.

   A menu of the available columns appears.
3. Select or clear column names.
4. Click anywhere outside of the menu.

   The results pane refreshes to show the column changes.

> **Note:**
> If you accidentally remove all columns, the view header will be unavailable to reconfigure the columns. To restore the hidden columns, press and hold the Ctrl key and click in the detail pane.

Sort Results List on a Column

> **Note:**
> The properties that may be selected for sorting are configured by a System Administrator.

To sort the results list on a column:

- Click the column heading.

  Click the heading again to reverse the sort order.
- Click the menu button for the column and then select **Sort Ascending** or **Sort Descending** from the menu that appears.

Filter Results List on a Property Value

To filter the results list on a property value:

1. Click the menu button for any column.

   The column menu appears.
2. Point to **Filters**.

   A search keyword text box appears.
3. Enter the name of a value upon which you want to search.

   The document list refreshes dynamically to show you the search results. You may refine your search criteria to obtain the results you want.
4. Click anywhere outside of the menu to complete the search.

   A filter icon appears in the heading of columns that are filtered.

Clear Column Filters

To clear column filters:

1. Click the menu button for any column.

   The column menu appears.
2. Clear the check box next to **Filters**.

   The results pane refreshes to show the filters removed.

Search In Import Packages

The **Documents** list in of an import package shows all the items in a package, but it can sometimes be easier to search for a particular item.

Searches are performed on the import package metadata with the **contains** operator. You cannot search in the item content.

To search in an import package:

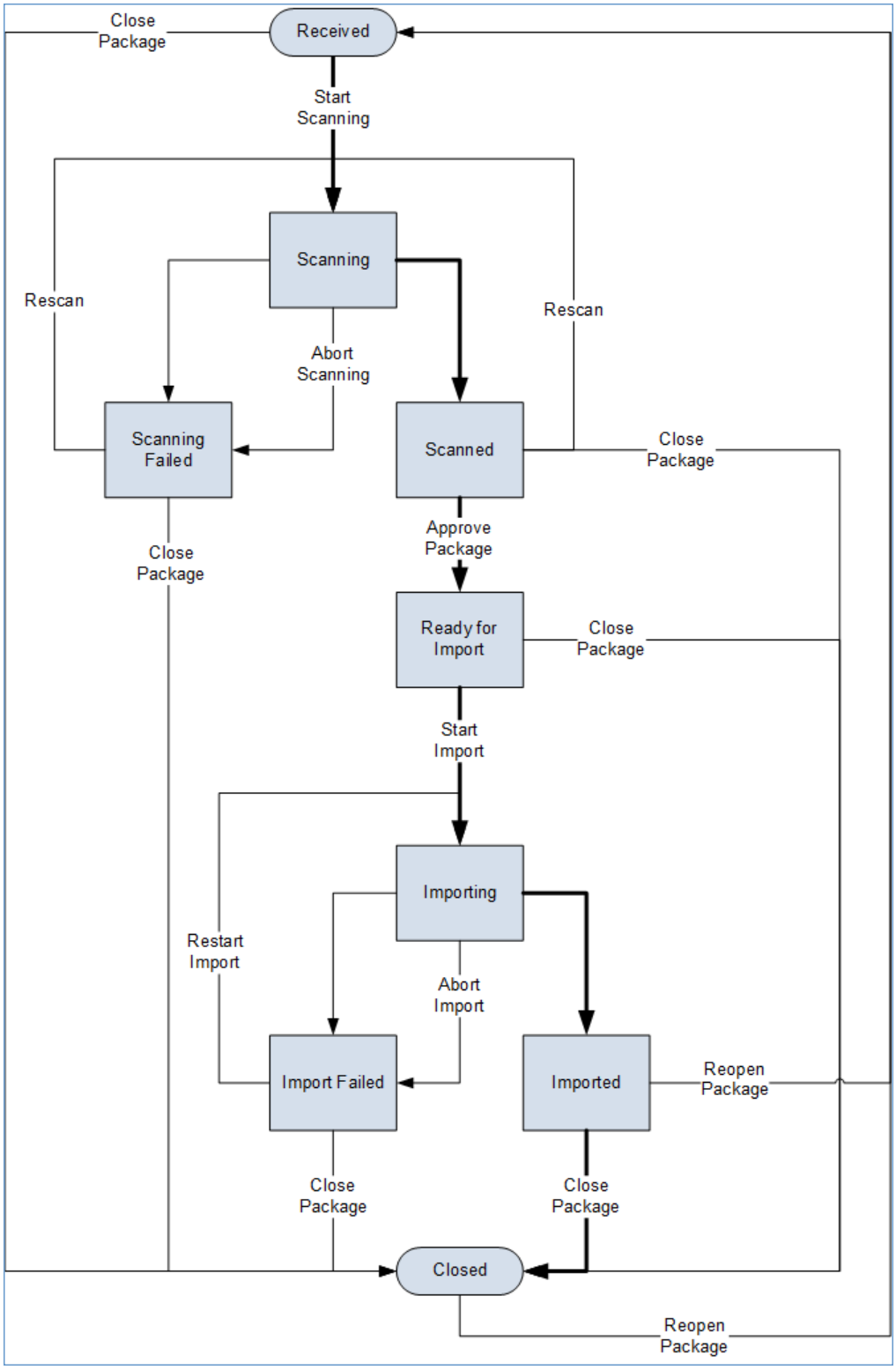
- Enter a keyword in the search box above the item list and click the search icon or press **Enter**.

  The list refreshes to show the search results.

Route an Import Package

The following flow diagram shows the possible states (shapes in the following figure) and transitions (connectors) of an import package. The states are shown in the **Status** property of an import package. The transitions are available as toolbar buttons when viewing import packages. The critical path of the workflow is shown with thicker lines. The other paths are optional or allow you to make corrections.

> **Note:**
> You must have the appropriate permission in the import profile that is assigned to the package in order to route the package.


Received
Close Package
Start Scanning
Scanning
Rescan
Rescan
Abort Scanning
Scanning Failed
Scanned
Close Package
Close Package
Approve Package
Ready for Import
Close Package
Start Import
Importing
Restart Import
Abort Import
Import Failed
Imported
Reopen Package
Close Package
Close Package
Closed
Reopen Package

Scan an Import Package

After you have created an import package as described in Create an Import Package, it is ready to scan for:

- Property mappings in the import profile match columns in the metadata file and in the destination vault
- Items that already exist in the destination vault
- Multiple revisions of the same source item can be sorted in ascending order using the specified property
- Title blocks that match link configurations in the vault
- All references that are specified in the **References** table of the metadata resolve to items in the import package.
- All references in the source items resolve to other items in the import package
- Main documents and parts of hybrid documents can be identified and sorted

> **Note:**
> You must have the **Scan** permission in the import profile that is assigned to the package in order to perform this task.

Scan an Import Package

To scan an import package:

1. Open the import package that you want to scan as described in View And Edit an Import Package.
2. For each item in the **Documents** list, review the information and the import action in the right pane, and confirm that they are correct.

   If the import data is incorrect, correct it in the metadata workbook and try again. If the action shown for **Default action** is incorrect, select a different action from **Take this action**. Setting the actions for a selection of items is also supported. The available actions are those that can be performed in the destination vault.

   > **Note:**
   > Some actions that are performed during an import are slightly different than how they work in Meridian Enterprise:

- The **Create New Revision** action creates a new revision of the vault item rather than replace the source item with a new item.
- The **Derive Document**, **Replace Document**, and **Create New Version** import actions place the imported item in the **Released** state, which is different from the corresponding commands in Meridian Enterprise.

3. In the toolbar, click **Start scanning**.

   A background task is started, the status of the import package changes to **Scanning**, and the icon of the import package changes to reflect its status. If two rows in the spreadsheet contain the same filepath for a document, scanning will fail and an error will be returned.

   When the process has completed, the status of the import package will change to either **Scanned** (successful) or **Scanning Failed** (failure) and a confirmation dialog box will appear. Click **OK**.

4. To halt the scanning process, in the toolbar, click **Abort scanning**.

   The background task is aborted and the status of the import package reverts to its previous state.

Filter on validation status

Once you have scanned an import package, the **Documents** list shows the **Skipped Reason** for each document that could not be imported. You can now filter the list to show only those that have metadata validation errors.

If you download and open the metadata spreadsheet in Microsoft Excel, you can also filter the list based on Validation Status.

To filter the list:

1. Select the down arrow in the **Skipped Reason** column.
2. In the menu that appears, select **Filters**.
3. Select the **Validation Failed** check box.

Approve an Import Package

After you have scanned an import package as described in Scan an Import Package, you can approve it for import.

> **Note:**
> You must have the **Approve** permission in the import profile that is assigned to the package in order to perform this task.

To approve the results of the scan:

1. In the menu, click **Documents**.

   The **Documents** page of the import package appears and lists the results of scanning the import package. The **Status** value of each item indicates how the item will be imported based on the current package data.
2. Review the information for each item and the import action in the right pane, and confirm that they are correct.
3. Click **Approve** to accept the results and your changes, which allows the package to be imported.

Import an Import Package

After you have scanned an import package and approved the results as described in Scan an Import Package, it is ready to import.

Notes about Functionality

- You must have the **Import** permission in the import profile that is assigned to the package in order to perform this task.
- Items that import successfully invoke all the same Meridian Enterprise VBScript events as if the item were created by a user, for example, the **DocGenericEvent_BeforeNewDocument** and **DocGenericEvent_AfterNewDocument** events. If the destination vault implements customization using these events, consider what effects importing a package may have before you import the package.
- When you import packages that contain multiple rows of metadata related to a single document (multiple revisions or hybrid documents, for example), if content cannot be found for any of the documents but the **Process the package without document files** option is disabled and the **Missing content** option is set to **Import empty document** instead of **Skip**, any files that are missing from the package will fail to import (as expected) but the main document will be left in the **Under Change** state in the vault instead of **Released**. This is because the main document is placed under change at the beginning of the import but it cannot be released at the end of the import because some of its dependent files failed. The main document must be released manually.
- Activate the **Import scanned packages** option to import packages automatically.

Import Package

1. Open the list of import packages as described in View And Edit an Import Package.
2. Select the import package that you want to import and then in the toolbar, click **Start import**.

   A background task is started, the status of the import package changes to **Importing**, and the icon of the import package changes to reflect its status.

   When the process has completed, the status of the import package will change to either **Import** (successful) or **Failed** (failure) and a confirmation dialog box will appear. Click **OK**.

   An item can fail to import for many reasons. The most common are:

- The import profile of the package has the **Validate property on import** option enabled and a property failed that validation.
- The document contains external references and one or more files are missing from the package.
- The item is a new revision of an existing item in the vault and that item is locked.

To determine why a particular item failed to import, see the text shown next to **Action taken** and **Comment** in the detail pane of the item in the import package. Also review the audit log for the package as described in View the Import Audit Log.

3. To halt the import process, in the toolbar, click **Abort importing**.

   The background task is aborted and the status of the import package reverts to its previous state.

View the Import Audit Log

Each of the successful package processing actions in Meridian Explorer and in Meridian Enterprise Server Administration Console are logged to a database. Items that fail to import for any reason do not create entries in the audit log. This data can be used to perform security audits and system troubleshooting.

To view the import audit log:

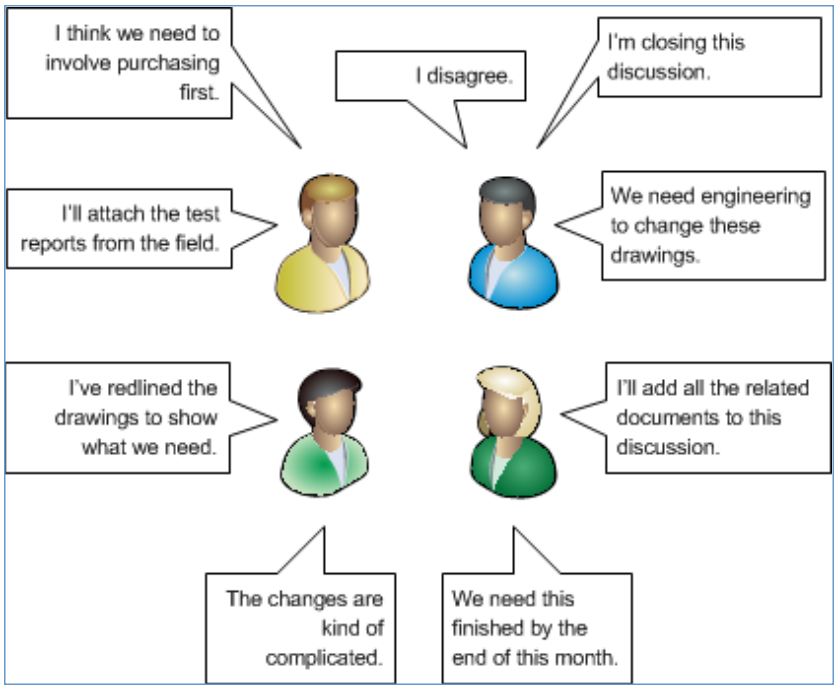
1. In the right sidebar, click **Import Packages**.

   The **Import Packages** page appears.
2. Select the package for which you want to view its audit log.
3. In the toolbar, click **Audit log**.

   The **Audit Log** dialog box opens and lists the logged actions.

Comments

Comments are collaborative feedback about documents or tags. You can use them with other users to make decisions as illustrated in the following figure.



Comments are linked to a document or tag that is the subject of the comment. Documents that are the subject of comments can be redlined and the markups will only be part of the comment and not visible outside the comment. Permissions set by a System Administrator determine who may edit, close, or delete comments. Documents that are outside the repository can be uploaded and attached to comments to provide more information for comment. You can easily see all comments about a specific document or tag.

> **Note:**
> The **Comments** feature is only available if you are using an Explorer Standard or Explorer Plus level license.

Comments have one of the statuses as described in the following table.

Comment statuses

Status	Description
Open	The default status of a new comment. These comments are visible by default.

Status	Description
Closed	This status may only be set by users with the correct permission. These comments are hidden by default but may be shown as described in View Comments.

View Comments

You may view any comment. You may only edit, close, or delete comments if you have the correct permission. Comments that include redline markups show the redline icon overlaid on the user icon of the comment.

View a Comment

To view a comment:

1. In the results list of any view, select the document or object for which you want to view its comments.
2. Choose between three options:
   - In the **Review** ribbon, click **Comments**.
   - Right-click the item and then click **Comments** in the shortcut menu that appears.
   - On the **General** page, click the **Comments** icon.

     The list of comments for the selected item appears with the latest comments at the bottom of the list.
3. To view the redlines for a comment, click the comment that you want to view.

   The viewer window refreshes to show the comments that are attached to the selected comment.

View Closed Comments

To view closed comments:

1. View the comments for the item as described in the preceding task.
2. Click **Show closed** at the top of the comment list.

   The closed comments appear in the list with a gray background and the text **[CLOSED]** next to the name of the user who entered the comment.

Add And Edit Comments

You may add comments to any document or tag. With the correct permission, you can also edit the comments of others. Comments are limited to 2000 characters.

Add a Comment

To add a comment:

1. In the results list of any view, select the document or object for which you want to add a comment.
2. In the **Review** ribbon, click **Comments**.

   The list of comments for the selected item appears with the latest comments at the bottom of the list.
3. Type your comment in the text box and click **Submit**.

   Your comment appears at the bottom of the list of comments.

Edit a Comment

To edit a comment:

1. View the comment as described in the preceding task.
2. In the comment toolbar, click the **Edit** icon .

   The comment text appears in the text box.
3. Edit the text and then click **Update**.

   The comment changes are saved.

Close a Comment

To close a comment:

1. View the comment as described in the task at the beginning of this topic.
2. In the comment toolbar, click the **Close** icon .

   A dialog box opens, asking you to confirm your choice.
3. Click **Yes**.

   The comment is hidden.

Delete a Comment

To delete a comment:

1. View the comment as described in the task at the beginning of this topic.
2. In the comment toolbar, click the **Delete comment** icon ✖.

   A dialog box opens, asking you to confirm your choice.
3. Click **Yes**.

   The comment is deleted.

Redline a Document In a Comment

When you make redlines on a document in a comment, they appear only in the comment. The redlines are not saved in the source Meridian Enterprise vault.

1. View the document that you want to redline as described in View Comments.
2. Choose between three options:
    - If PDFTron is configured as the viewer, mark up the document as described in Annotate Document Renditions.
    - If Adobe Reader is configured as the viewer, use the comment tools to markup the document.

Comment Attachments

You may upload files from your PC to provide additional information for a discussion. The files are not imported into the repository or otherwise linked to the document that is the subject of the comment.

> **Note:**
> Attachments may be up to 50 MB in size.

Attach a File to a Comment

To attach a file to a comment:

1. Add a comment to the discussion as described in Add And Edit Comments.
2. Under the comment text box, click **Attach**.

   The **Choose File to Upload** dialog box appears.
3. Navigate to and select the file that you want to upload and then click **Open**.

   A thumbnail and the filename of the attachment appear below your comment.

View an Attachment

To view a file attached to a discussion:

1. View the discussion that has the file attached as described in View Comments.
2. Click the filename of the attachment that you want to view.

   The file is downloaded by your browser and you are prompted to open or save it.

Remove an Attachment

To remove a file that you attached:

- Click the **X** next to the filename.

  The file is detached from the comment.

Projects

Project folders are made in the Meridian Enterprise source vault using the system's Managed Change or Meridian Advanced Project Workflow Module features. Project folders can contain the working copies of master documents that reside elsewhere in the vault. Projects can have workflows that match the business processes of the project owner. The project copies are typically revised as part of a project and the copies will either supersede or be merged with the master documents when the project has completed.

In Meridian Explorer, projects are shown with a special icon . Projects can have their own custom properties such as **Project Number** or **Manager**. You can work with projects in Meridian Explorer in many of the same ways that you can with documents. That is, with the same search methods, view pages, and property pages as documents or tags.

View And Open a Project

Viewing a project lets you see its properties and subprojects, if any. Opening a project lets you to see all of the repository items that are associated with the project. You can view and open a project folder with the following methods.

Begin by opening a project view from the **Home** page.

View Project Properties in Detail Pane

To view project properties in the detail pane:

- Click the project name.

  The property pages for the project appear in the detail pane.

View Project Properties in New Tab

To view project properties in a new tab:

- Choose between two options:
  - Click the project icon .
  - In the **Review** ribbon, click **Properties**.

    The property pages for the project appear open in a new tab window.

See Documents in Project

To see the documents in the project:

1. In the **Review** ribbon, click **Documents**.

   A view opens in a new Meridian Explorer tab.
2. Choose between two options:
   - To exclude the documents in the subprojects:
     - In the **Review** ribbon, click **Project only**.
   - To include the documents in the subprojects:
     - In the **Review** ribbon, click **Subprojects**.

See Tags in Project

To see the tags used in the project:

1. In the **Review** ribbon, click **Object Tags**.
2. Choose between two options:
    - To exclude the tags in the subprojects:
        - In the **Review** ribbon, click **Project only**.
    - To include the tags in the subprojects:
        - In the **Review** ribbon, click **Subprojects**.

Add a Project To Your Favorites

You can add a project that you work with frequently to your **Favorites** list so that it is more convenient to open.

To add a project to your Meridian Explorer **Favorites**:

1. In a results list that contains the project, right-click the project that you want to add.

   The shortcut menu appears.

2. Click **Add to Favorites**.

   The project appears in the **Favorites** tab on the **Home** page.

Assign Security Roles - Explorer

The security of a project is determined by the permission levels that have been assigned to roles for the project and by the users and groups that are members of those roles. The permission levels and roles are defined in Meridian Enterprise Server Configurator by a System Administrator. The default roles for new projects and their members are also defined there. The members of the default roles can be changed in Meridian Explorer to meet the requirements of each individual project.

To assign security roles to a project:

1. On the **General** page of the project, click **Security**.

   The ***<ProjectName>* - Update Project Memberships** dialog box appears and lists the roles that have been assigned to the project.

2. Choose between two options:
   - To view the current members of a role, select the role.

     The members of the role appear to the right.
   - To add a group or user to the role:
     a. Click **Add Group** or **Add User**, accordingly.

        The **Add Groups** or **Add Members** dialog box appears.

     b. Select the names that you want to add and then click **OK**.

        The names are added to the list of role members.

     c. Click **Save**.

        The role memberships are updated.

For information about configuring roles and permission levels, see *Security Roles* in the *Meridian Enterprise Server Administrator's Guide*.

Configure Personal Preferences

Most of the configuration of Meridian Explorer is done by a System Administrator but you can configure some personal preferences that make it more convenient for you.

To configure personal preferences:

1. In the upper-right corner of any page, click your user name.

   Your personal profile pages appear.
2. In the page menu, click **General**.

   Your general preference options appear.
3. Click options or type values using the descriptions in the following table.

Personal preference options - Application page

Option	Description
Language	Click **Change** to select the language in which you want the Meridian Explorer user interface (not data) to be shown.
Local user settings	Click **Reset** to remove your personal settings and restore the default settings.
Workspace	Computer name of the location of your preferred local workspace.

Configure Options

These options configure how files are downloaded and how Adobe PDF files are viewed. The download options determine where files are downloaded from Meridian Explorer to your computer and what to do afterward.

As of the 2022 release, you cannot edit these options if Web Client components are not installed on the workstation or if you are using Internet Explorer.

To configure options:

1. In the upper-right corner of any page, click your user name.

   Your personal profile pages appear.
2. In the page menu, click **Options**.

   Your options appear.
3. Click the **Change** link for the **Download Options** setting.

   The **Meridian Upload/Download Control** dialog box appears.
4. Click options or type values using the descriptions in the following table.

Download options

Option	Description
Download location	Click the browse button and select a location on your computer where you want files to download unless **Download to Local Workspace** is enabled.
Download to Local Workspace	Downloads documents to your Meridian Enterprise Local Workspace folder.
Prompt before download	Displays the **Accruent Upload/Download Control** dialog every time documents are downloaded so that you can select different options each time.
Open folder in Windows Explorer	After the documents are downloaded, opens the download location in Windows Explorer so that you can easily open files for editing.
Open it in application	If only one document has been downloaded, opens the document for editing. The file will be opened in the application that is registered with Windows on your computer for the downloaded file type.
Add it to Windows' recent documents list	Adds the item to the **Recent Items** list in the Windows **Start** menu.

Configure Your Avatar

Your avatar is the image that appears next to your name. If you do not upload an image, the default image is used.

To configure your avatar:

1. In the upper-right corner of any page, click your user name.

   Your personal profile pages appear.
2. In the avatar image area, click the **Change** icon .

   The **Change Avatar** dialog box appears.
3. Choose between two options:
   - To upload a different image:
     a. Click **Upload**.

        The **Upload Avatar** dialog box appears.

     b. Click the **Browse** icon .

        The **Choose File to Upload** dialog box appears.

     c. Select an image file on your local computer to upload and then click **Open**.

        The filename appears in the **Change Avatar** dialog box.

     d. Click **Upload**.

        The file replaces the current avatar image.
   - To reset your avatar to the default image:
     - Click **Remove**.

       The default avatar image replaces the current avatar image.

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 indefinintely. 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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