Meridian Explorer
User Guide

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Introduction

Meridian Explorer is a web based application which can be used to search and retrieve drawings and other documents stored in the University of Alberta Meridian Vaults. The Meridian system is also known as UIRAP (University Infrastructure Records Access Program).

This guide explains how to perform these operations using Meridian Explorer:

- Browse, navigate, and search for documents in Meridian repositories.
- Search for text contained within documents.
- View, download and print documents.
- Save documents Searches and reuse them.
- Create and maintain documents Collections.

Important Concepts

Meridian Vault

A Meridian vault is the storage unit used by the Meridian system, and it is a combination of a database containing documents properties or metadata, and a folder structure containing the actual documents. Currently the University of Alberta Meridian System has two vaults:

- UALBERTA01

This vault contains the Master Documents for Buildings and Sites, and the Project Documents for Buildings and Sites.

- Records Management

This vault contains reference information to actual physical documents stored in storage rooms.

Note: This document describes how to find documents in the UALBERTA01 vault.

Documents Metadata

When a document is stored in Meridian there are a group of properties which are used to classify it. These properties are known as document metadata, and are used to retrieve the documents from the system. Examples of these properties are: Document Name, Type, Class, Subclass, Discipline and System.

Document Types

The document type is a crucial piece of metadata as it defines the properties used to classify a particular document. To be able to retrieve a document from Meridian the user must understand the document types used in the system. Currently we use five document types, which are described in Table 1.

Document Rendition

A rendition is a representation of an original document in a different file format. Meridian allows attaching a rendition to an original document. For example we create PDF renditions for the AutoCAD drawings, and attach them to the original drawings. The Meridian Web Client User can retrieve the original document or the PDF rendition if it is available.

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	Documents Types	Examples
Masters	**Master Building** Building live reference information	CAFM Floor Plans Drawings and Organizations Allocation Plans
	Master Site Site live reference information	Site Master Maps, Site Utility Layouts
	Master Group General Documents not associated to specific Sites, Buildings or Projects	Policies, Design Guidelines, Standard and Specifications
Projects	**Project Building** Buildings Projects Information	As Built drawings, IFC, IFR, IFT, Shop Drawings, Reviews, O&M Manuals
	Project Site Sites Projects Information	As Built drawings, IFC, IFR, IFT, Shop Drawings, Reviews, O&M Manuals

Table 1

Note: This document will indicate how to select the document type while doing document searches.

Requirements

- Use the **Internet Explorer** browser to access the Meridian website. Other browsers like Firefox and Chrome will not render the drawings properly, or may have limited functionality.

- The Meridian user has a login name in the UIRAP domain and a temporary password created by the system administrator.

Opening a Meridian Repository in Meridian Explorer

- Launch Internet Explorer browser and access this URL.

  http://bcexplore.uirap.ualberta.ca/bcenterprise

- The log in dialog box will be displayed (Figure 1)

- Enter the username (preceded by the domain name "**uirap"**) and the password, and Click the "**OK**" button to continue.
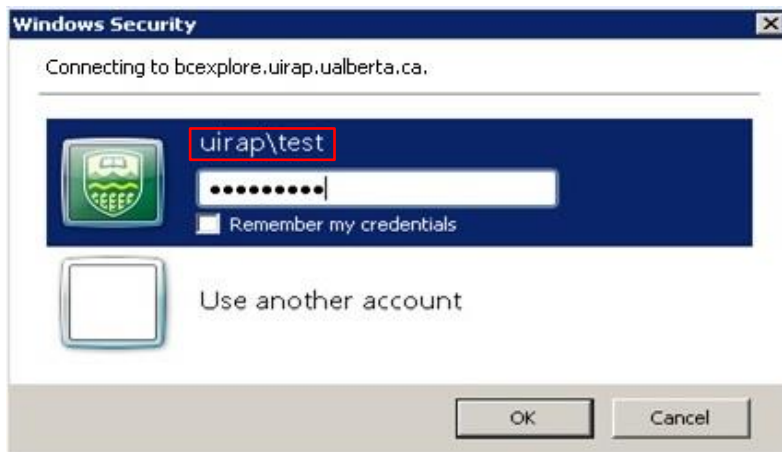
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Figure 1

▪ After logon the Meridian Explorer Home page will be displayed (Figure 2).

Using the Home Page

The Home Page contains three panes, the **Menu** pane to the left, the **Views** pane at the Center and the **User Preferences** pane to the right. After logging in, the **Views** menu option is selected by default. The **Views** pane shows a list of the Views that can be used to search for documents in the Meridian vaults. These views are configured by the system administrator.
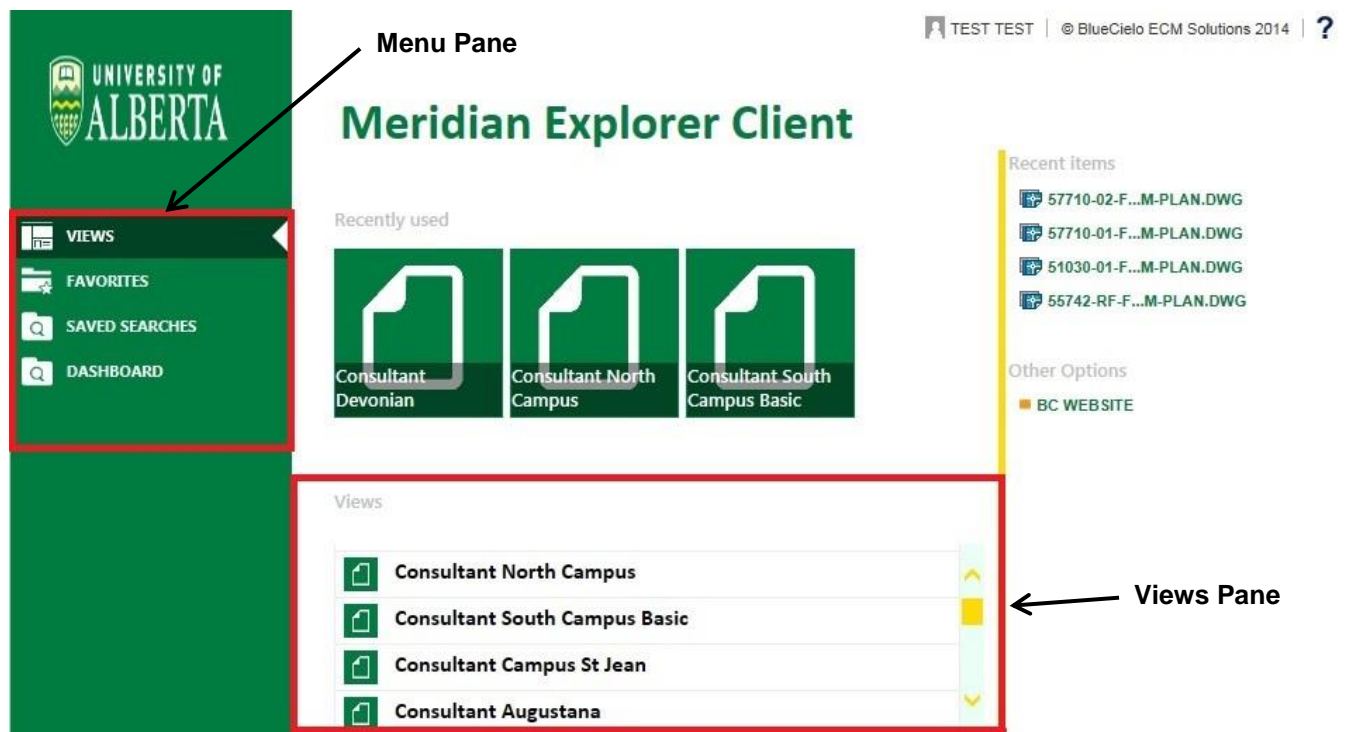

Figure 2

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Opening a View

In Meridian Explorer, a view displays the documents existing in the repository filtered by criteria set by the system administrator. Multiple views can be configured for different purposes. Views with specific properties in common are grouped together into view groups by the system administrator.

To open a view:

▪ At 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.

Opening a Saved Search

Document Searches can be saved to be reused later. They include the filter criteria used to search for documents.

To open a Saved Search:

▪ On the Home page menu click **SAVED SEARCHES**. Your saved searches appear in a list.
▪ Click the saved search that you want to open. The view from which the search was saved opens in the web browser window.

Using View Pages

When you open a view from the Home page or click the tab of an already opened view, a view page appears that shows the items that match the view's configuration. The view page includes a navigation pane, a results pane, and a details pane (Figure 3).
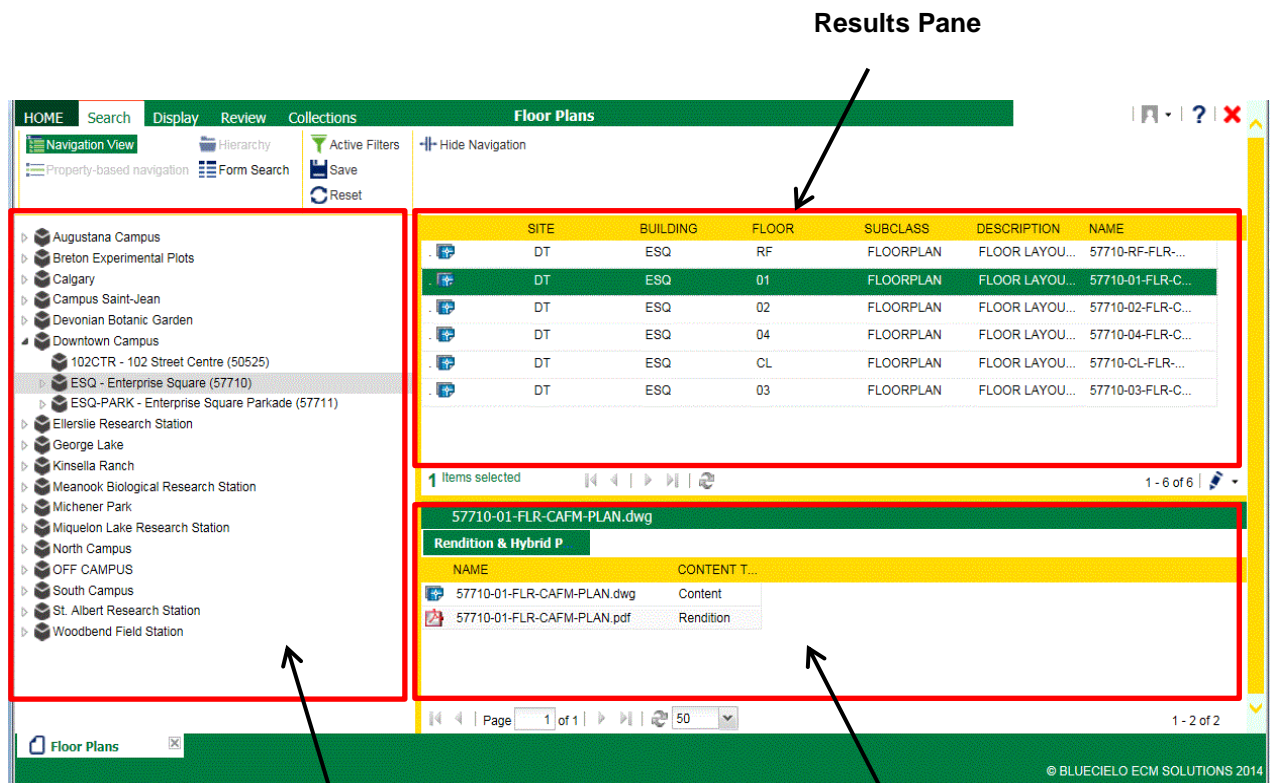
Results Pane

Figure 3

Navigation Pane

Details Pane

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You use the navigation pane to explore and search for documents in 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 details pane.

Searching for Documents

There are two types of searches available in Meridian Explorer.

1) Property based searches

The Property based searches are based on the documents **properties** or **metadata** values. These are the three search methods available.

- Navigation View
- Property based navigation
- Form search

2) Document Content based searches

The Document Content based searches are based on searching for text inside the documents.

Property Based Searches

Navigation View

Browsing by a navigation view lets you find documents by selecting values for properties in a hierarchical tree. In the hierarchical browsing 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 displayed 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.

Navigation views are configured by a system administrator. You have to select the **schema** (Master Building, Project Building, Master Site, Project Site) corresponding to the document type that you want to search.

To search with Navigation view:

- In the ribbon menu, click **Search** and then click **Navigation View**. The root level of the navigation view will show (Figure 4).

- Click **Schema** if you need to change the document type that you want to search for.

- Click the expand icon (▷) to view the property values of the next level of the view without affecting the results pane. To hide the property values, click the collapse icon (◢).

- 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.
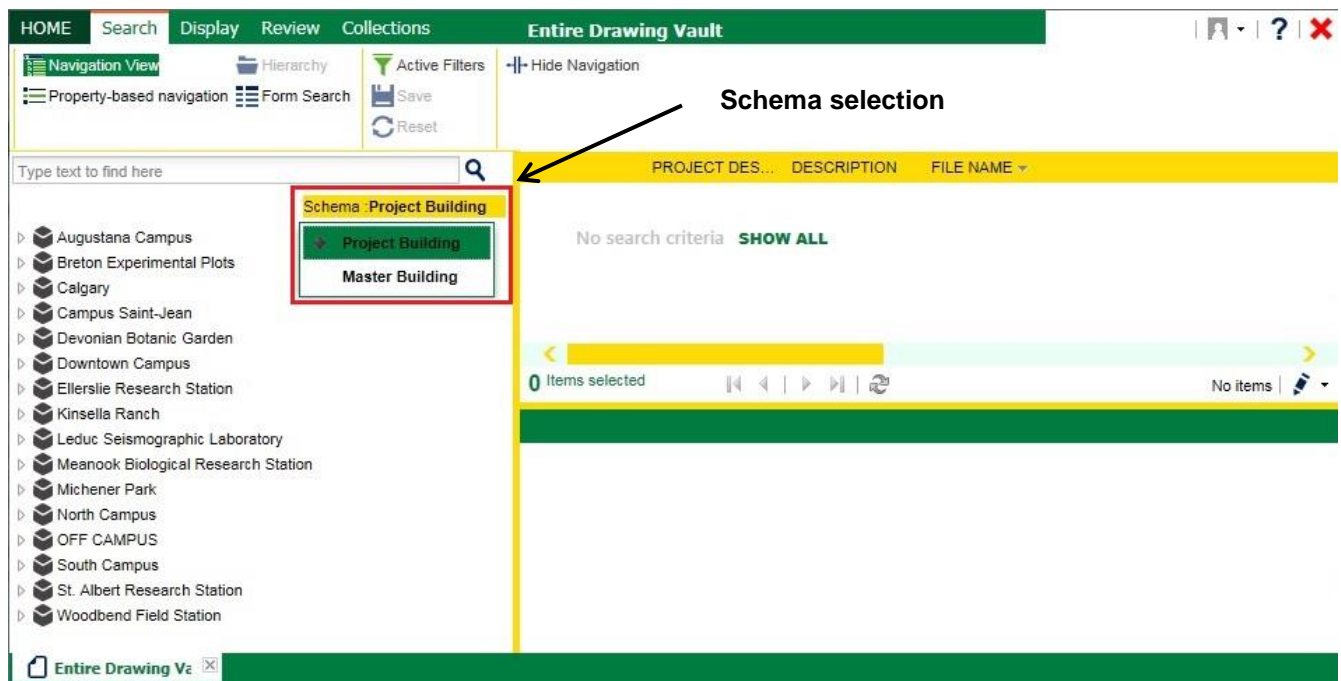
Figure 4

Property based Navigation

Browsing by property based 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. The properties that are available for property navigation are configured by the system administrator. When you find the items that you are looking for, you can save the current view **filter** for later reuse.

To search with Property based Navigation:

▪ In the ribbon menu Click **Search** and then click **Property based navigation**. A list of the properties which are available for navigation and their existing values displays in the navigation pane (Figure 5).

▪ If there are more than a configurable number of values for a property, a **Filter** box is shown at the top of the list (Figure 5). Type text in this box and press Enter to reduce the number of values. The number of values that are shown is configured by a system administrator.

▪ Select the **document type** that you want to search for.

▪ 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. Repeat the preceding step for additional values until the results pane list includes the items that you want to find.

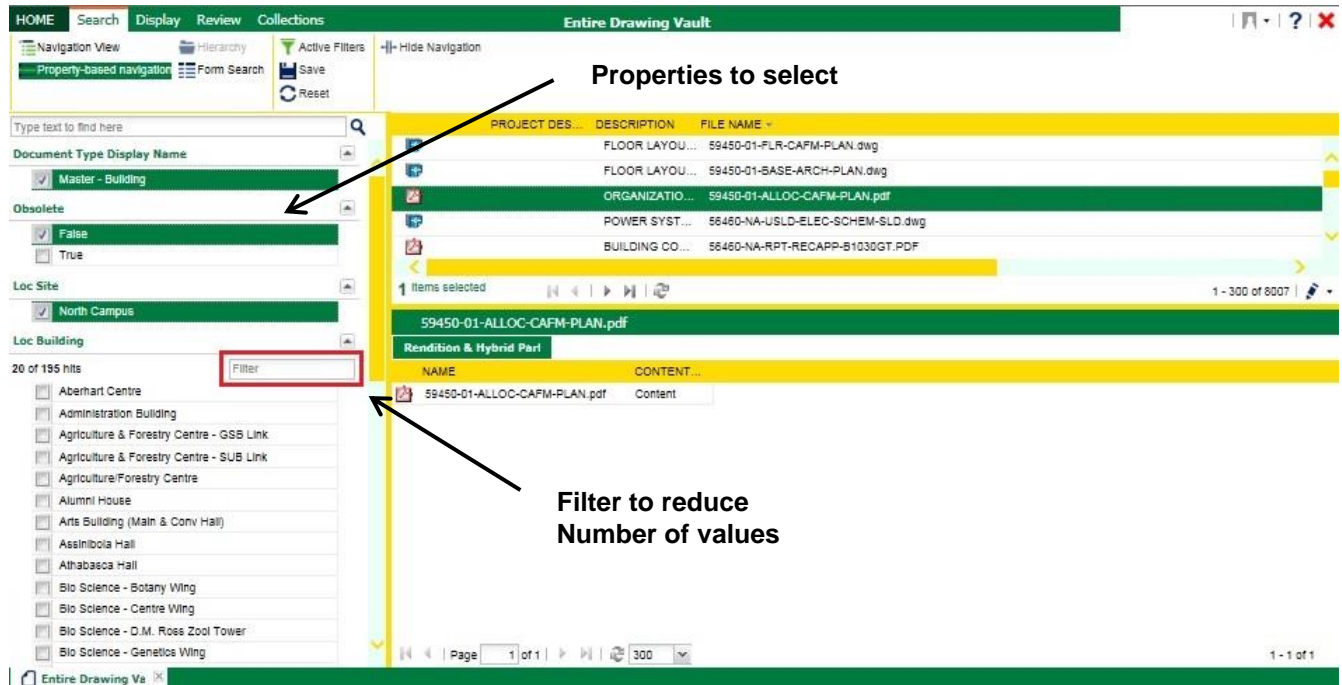▪ To clear a property filter, clear the checkbox next to its name.

Figure 5

Form search

Form Search lets you search for documents by specifying the search criteria using combo boxes or text boxes.

The properties which are available for searching are predefined by the system administrator. 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.

To use Form search:

▪ In the ribbon menu click **Search** and then click **Form search**. The available search options show (Figure 6). By default, one or more search criteria with empty combo boxes or textboxes might be available. These are configured by the system administrator.

▪ When you are finished specifying the search criteria, click the **SEARCH** button (bottom right corner of the navigation pane). The search results appear in the results pane.
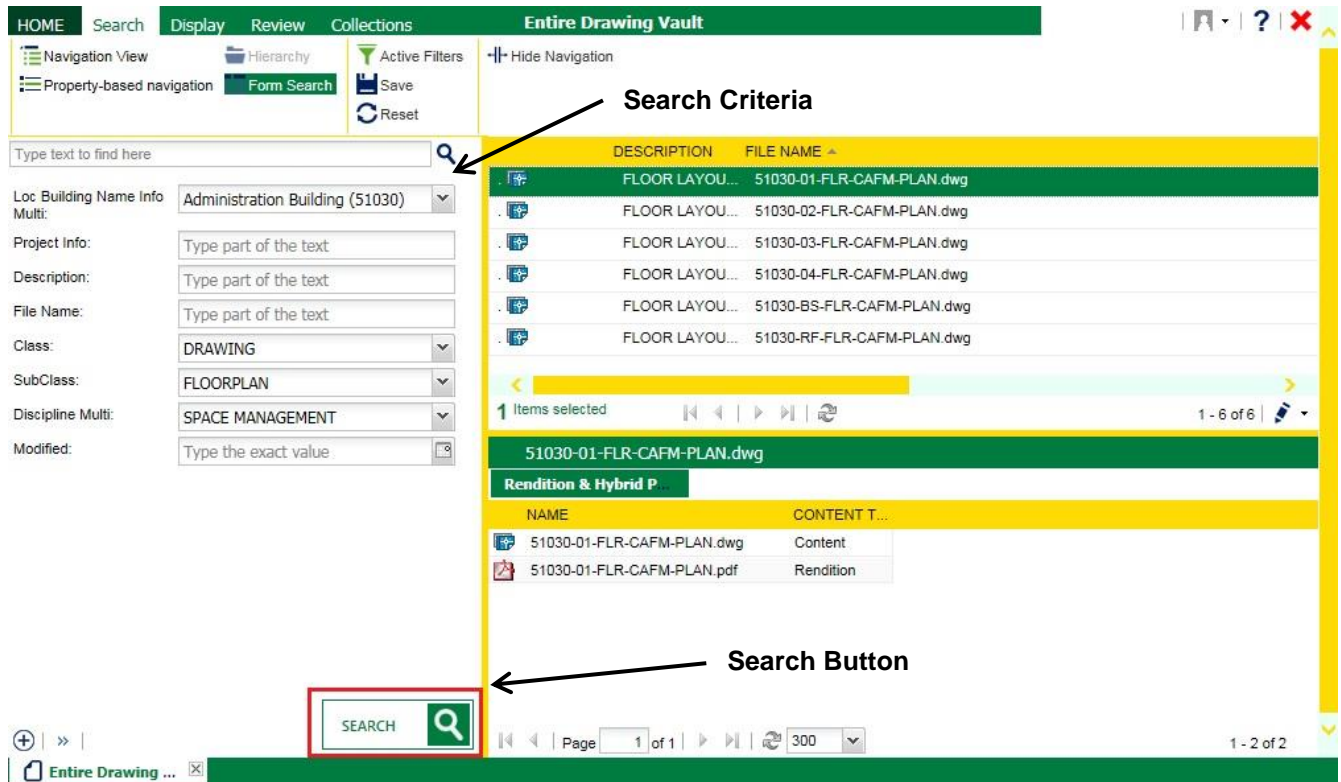
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Figure 6

Searching in Document Content

Document content searches find documents by searching the content of documents for text that you specify.

To search in document content:

- On any view page, in the text box at the top of the navigation pane type the text that you want to find into the **Type text to find here** box and press Enter or click the search icon ($\mathbb{Q}$) . The results displays in the results pane list (Figure 7).
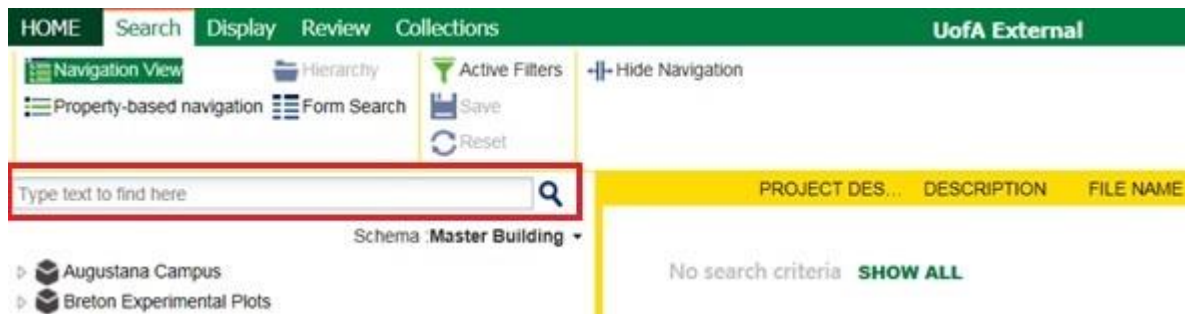

Figure 7

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Working with Documents

A Meridian Explorer repository is read-only but there are commands that can be used to work with repository documents. Some of these commands can be applied to a selection of multiple documents.

To select multiple contiguous documents in the results pane:

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

To select multiple non-contiguous documents in the results pane:

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

Viewing Documents

Meridian Explorer supports document viewers which let the user view documents in the browser. You can open documents with the viewer from anywhere the document's name is shown. Once opened, you can use the viewer's tools to examine the document.

To view the document from the Results list

▪ In the Results pane, right click on the document name and a shortcut menu appears (Figure 8).
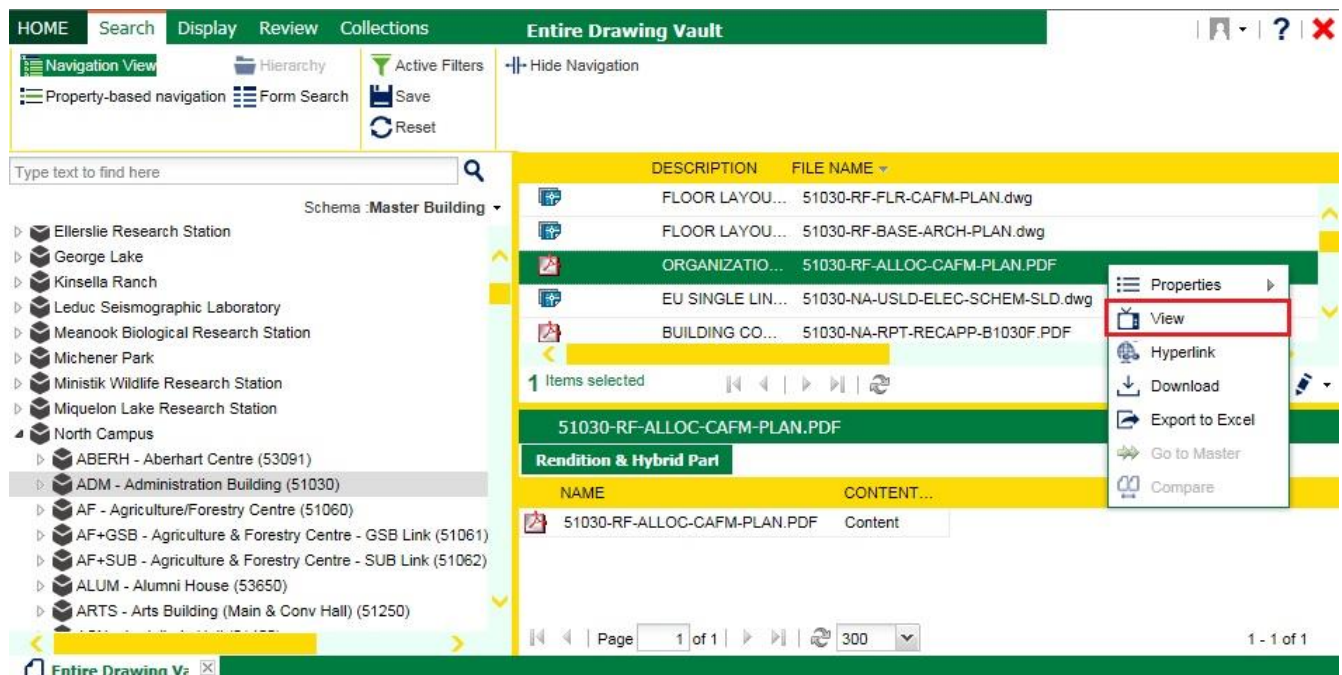▪ Click **View** and the selected document opens in the **Viewer** (Figure 9)**.**

Figure 8

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Note: A document can be viewed also by **double clicking** on the document name in the Details pane, or by **right clicking** on the document name in the Details Pane and selecting the **Open in Viewer** option in the menu.
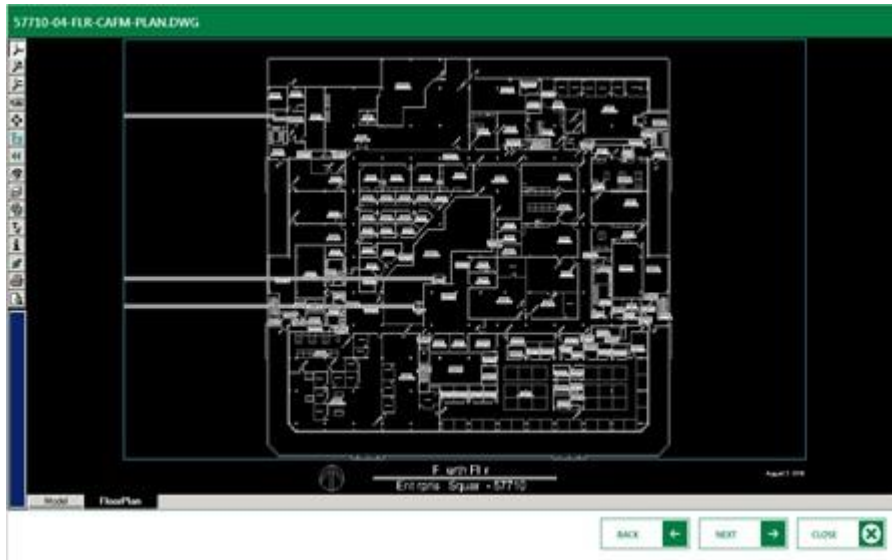

Figure 9

Download Documents

Downloading documents from the Meridian repository creates copies of the files in a location on your PC that you specify.

To change the default location where documents are downloaded

▪ Click on your user name at the upper right corner of the page (Figure 10).

Figure 10

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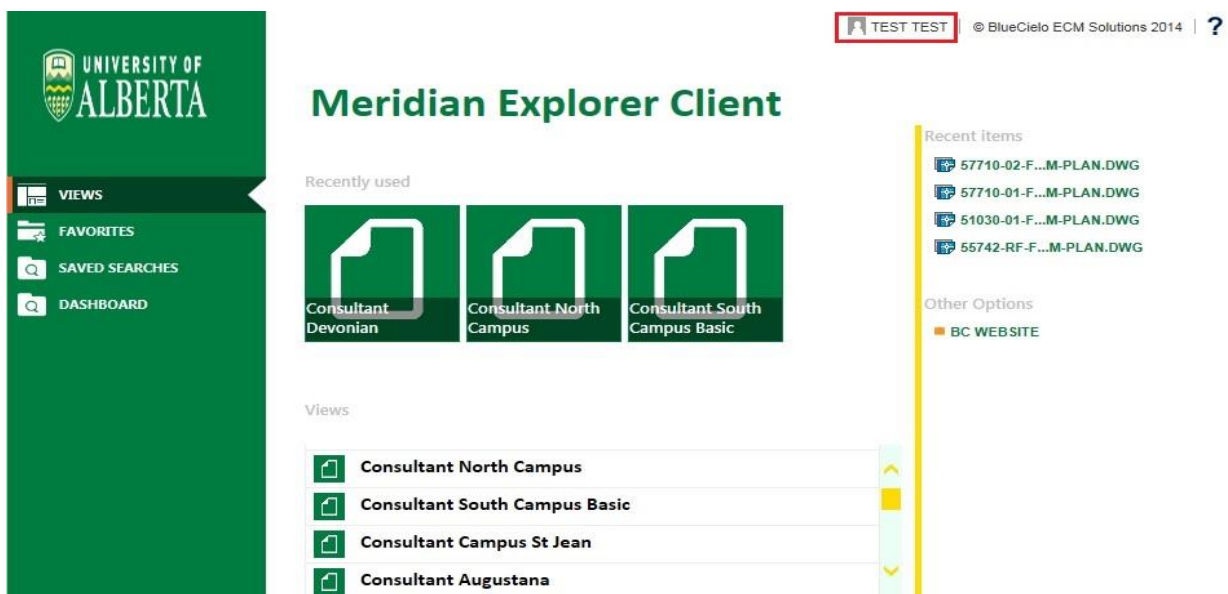
- The personal profile page will appear (Figure 11).
- Click **OPTIONS**.
- Click **CHANGE** in the **Download options** section and change the download location.
- Click the **OK** button.

Figure 11

To download documents

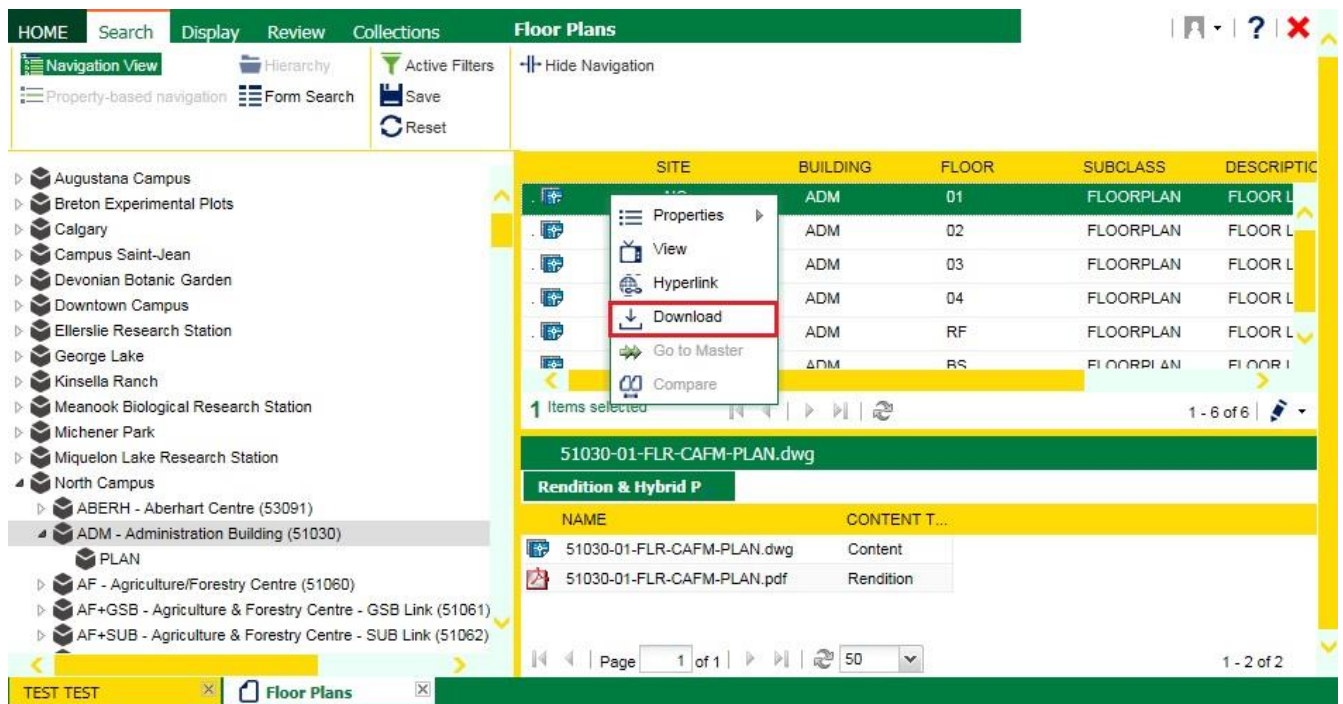- In the Results pane, right click the document name and a shortcut menu will display (Figure 12).

Figure 12

- Click the **Download** option in the shortcut menu.

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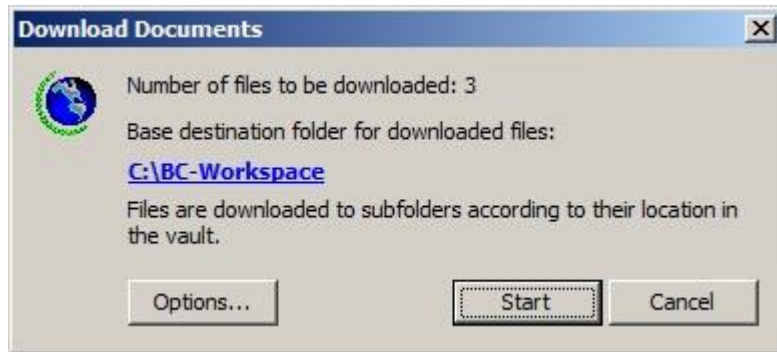▪ The Download Documents dialog box will be displayed (Figure 13).

Figure 13

▪ Click the Start button to initiate download.

You can select multiple documents and download them following a similar procedure.

Note: To download multiple documents in a batch you need to install the download control in your local workstation. Please contact the Meridian system administrator at fodts@ualberta.ca to have the download control installed.

Working with Saved Searches

Save searches for future use

You can save your searches to reuse in the future, so you don't have to search the documents again. You can also overwrite an existing saved search with a new result set.

To save a Search

▪ Search for documents using any of the methods described before.

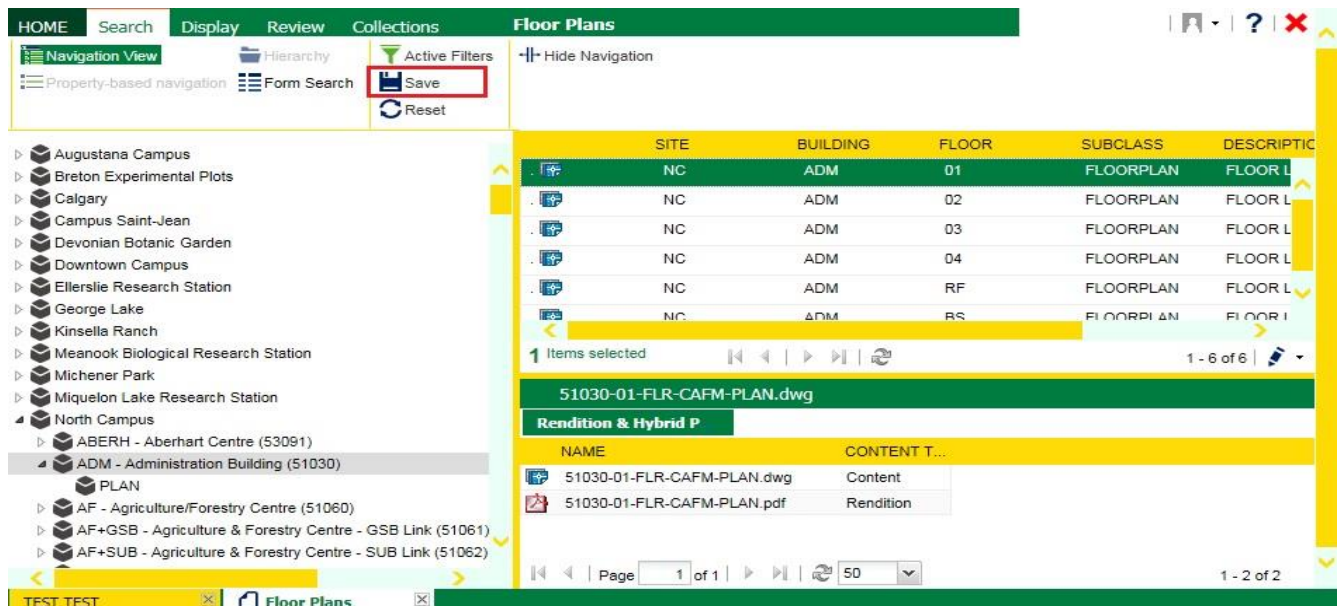▪ In the **Search** ribbon click the **Save icon (💾) (**Figure 14).

Figure 14

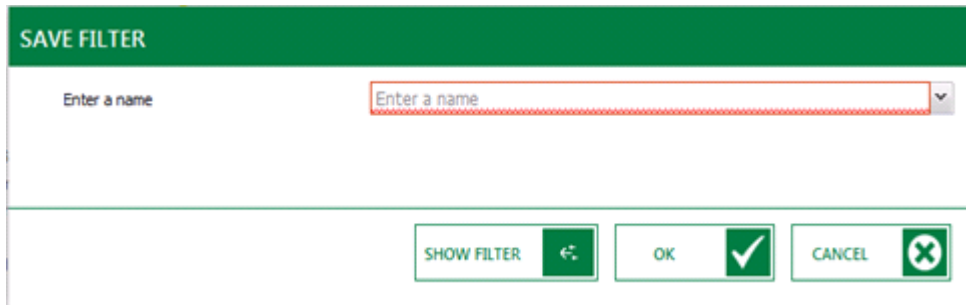▪ The **SAVE FILTER** dialog box will display (Figure 15).

Figure 15

▪ Enter a meaningful name for the filter.
▪ Click the **OK** button.

Retrieve Saved searches

The "**SAVED SEARCHES"** can be retrieved and reused.

To retrieve the saved searches

▪ Click "**SAVED SEARCHES**" on the home page menu and the existing saved searches items will show (Figure 16).
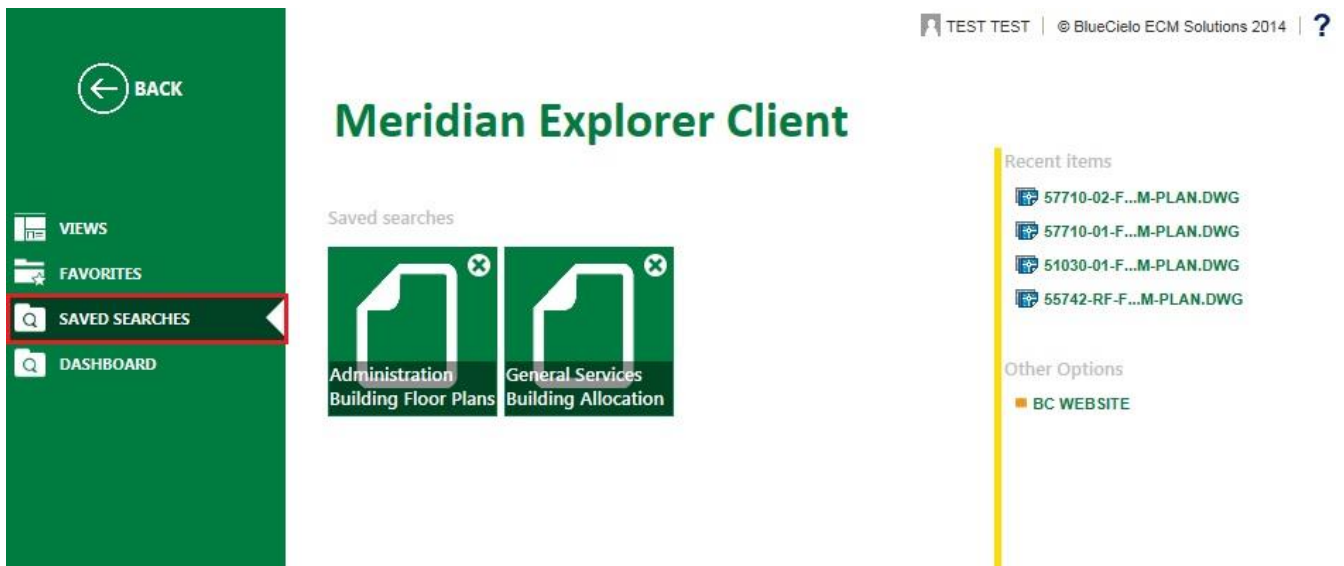▪ Click on the relevant saved search to open it.

Figure 16

Deleting a Saved search

The saved searches that are no longer useful can be deleted.

To delete a saved search

▪ On the Home page menu click "**SAVED SEARCHES**", and the saved searches appear in the list (Figure 17).

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▪ Click the delete icon (✖) next to the search that you want to delete.
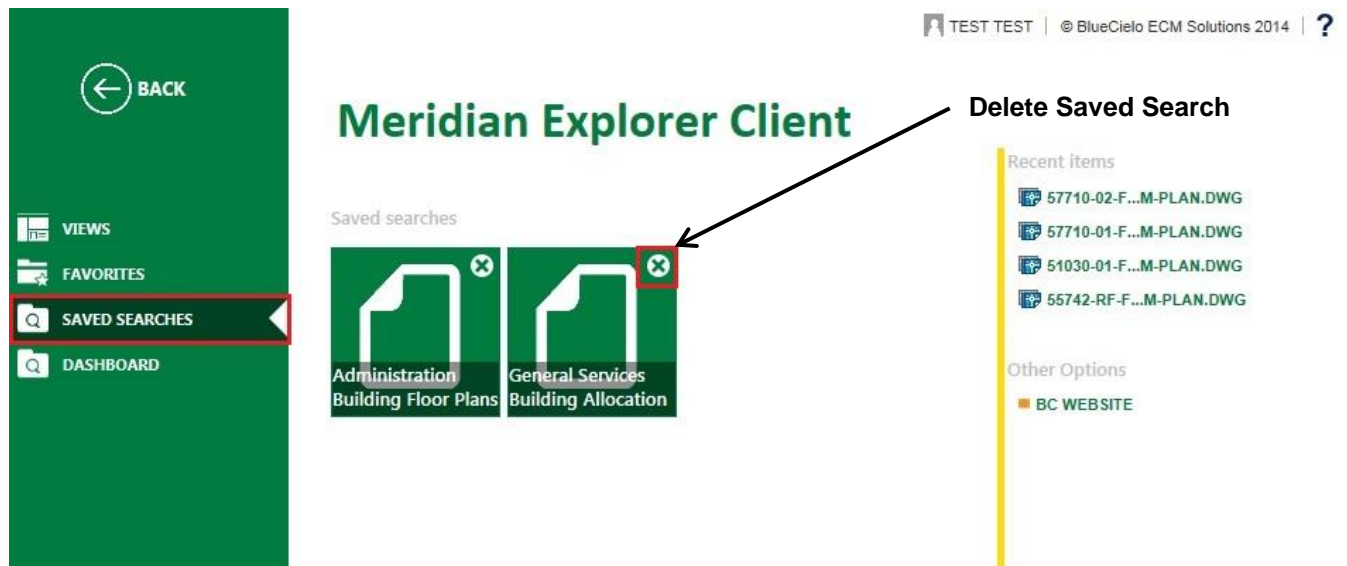

Figure 17

Working with Collections

A collection is a set of documents which are related in some way. Collections can be either private to you (default) or 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 documents regardless of any changes to them.

Creating and editing a Collection

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

To create a new collection

▪ Select the documents from the results pane.
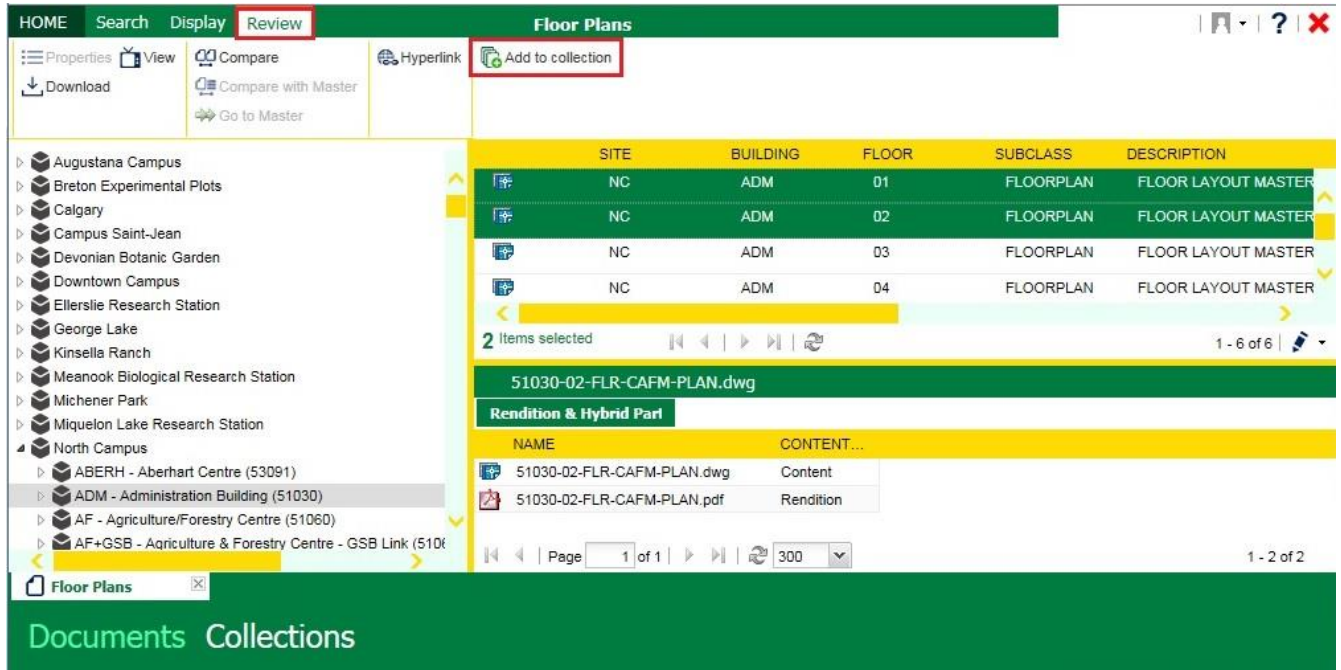▪ Click **Review** from the ribbon menu (Figure 18)

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Figure 18

- Click the **Add to Collection** button (Figure 18). The **ADD TO COLLECTION** dialog box will show (Figure 19)
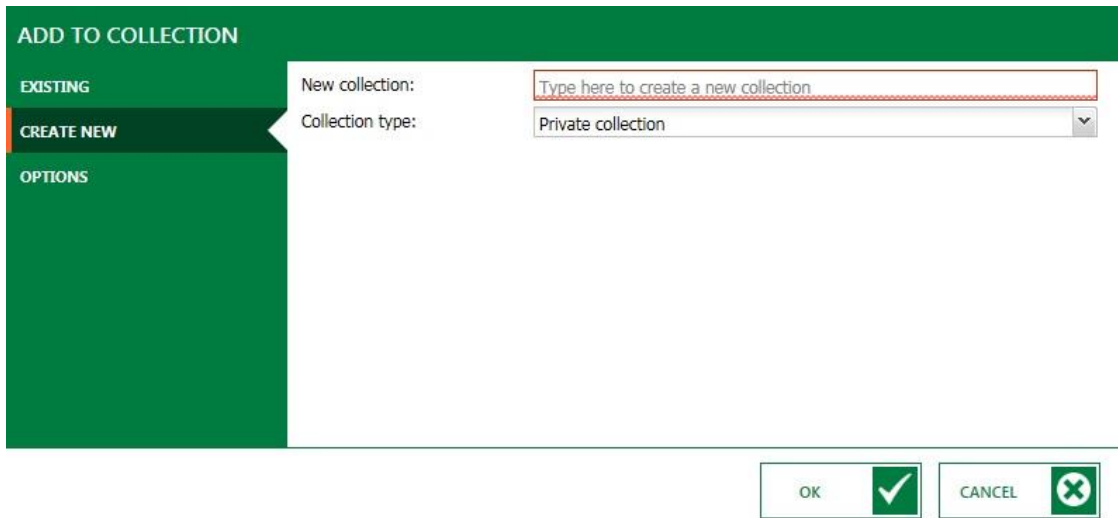

Figure 19

- Click **CREATE NEW** option**,** and enter the name for your collection.
- Select the Collection Type, which can be **Private** or **Shared**. **Private** collections are available only to the creator. **Shared** collections are available to other users.
- Click the **OK** button to save.

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An alternative way to create a collection includes these steps:

- Select the documents from the results pane.
- **Right click** on the selected documents and in the contextual menu select the **Add to Collection** Option.
- Enter information in the **ADD TO COLLECTION** dialog box (Figure 19).

To View a collection

- At the bottom of the Meridian Window select **Collections**.
- In the ribbon menu click **Collections**, and then in the ribbon click **Show Collections** (Figure 20)
- In the navigation pane click the name of the collection you want to view. The content of the collection shows in the Results Pane.
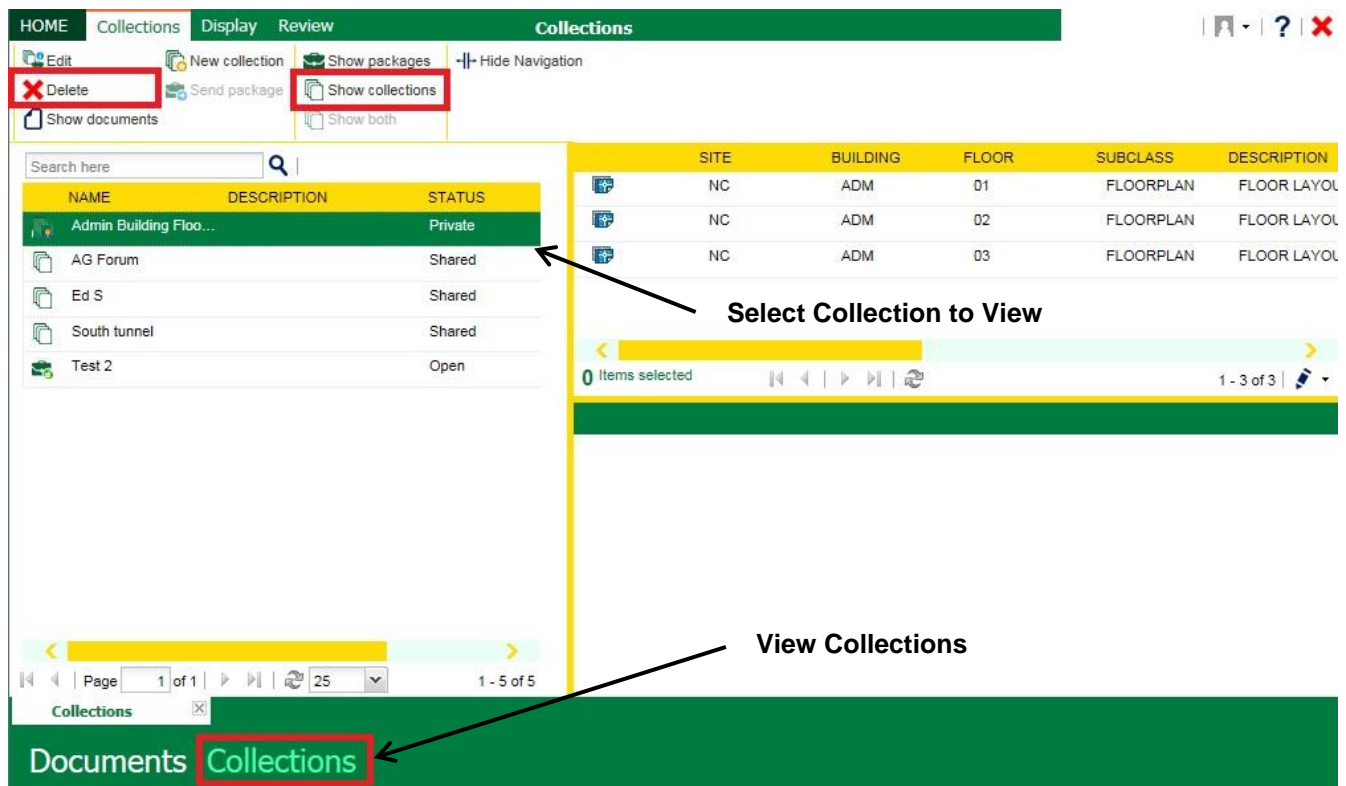

Figure 20

To remove a collection

- Select the collection you want to delete.
- In the ribbon click the **Delete** option (Figure 20). The collection is deleted.

Note: To remove a collection you must be the user who created the collection or a system administrator.

Use Meridian Explorer help

You can have access to additional information on how to use Meridian Explorer by using the application help.

To access Meridian Explorer help

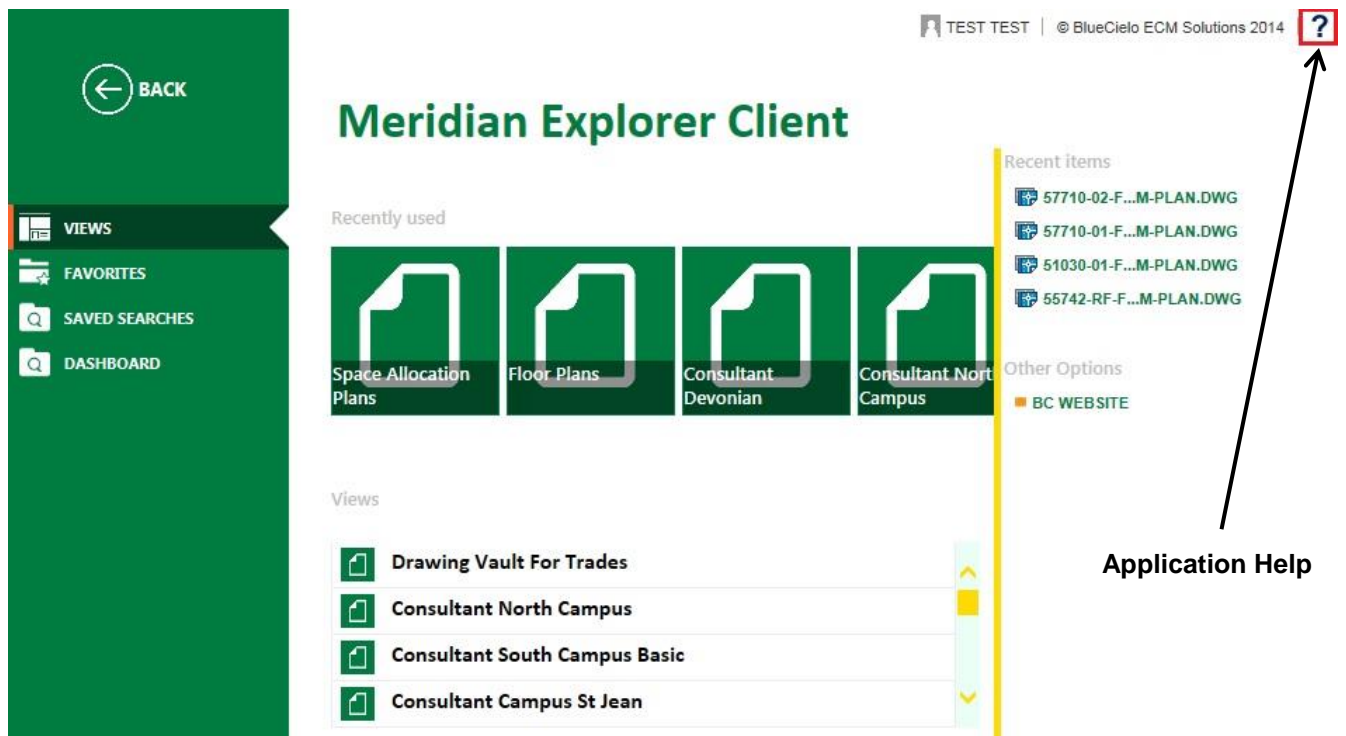▪ Click the question mark icon (?) located at the top right corner of the Meridian Explorer window (Figure 21)

Figure 21

References

BlueCielo Meridian Explorer 2016 – User's Guide

BlueCielo Meridian Enterprise 2016 – Supported Software