

Meridian User Guide Explorer Client

Meridian Explorer Client 2023 Accruent

Revision 12 - Last updated August 2024

Contents

| | |
|---|-----------|
| 1. Introduction | 3 |
| 1.1 What's in this guide | 3 |
| 1.2 Who should read this guide? | 3 |
| 1.3 Typographic Convention | 3 |
| 1.4 Accessing application | 4 |
| 1.5 Naming convention | 7 |
| 1.6 Document taxonomy | 7 |
| 1.7 Technical support | 7 |
| 1.8 Definitions | 7 |
| 2. Home page and Landing page - Application | 8 |
| 2.1 Home page | 8 |
| 2.2 Landing page | 9 |
| 2.3 Searching for a document | 10 |
| 2.4 Saving a search | 10 |
| 3. Navigation | 11 |
| 3.1 Browsing | 11 |
| 3.2 Different types of documents and their meta-data | 11 |
| 3.3 Searching (with-in a view) | 13 |
| 3.4 Results Pane List from searching (all types) | 14 |
| 3.5 Navigate the results list | 14 |
| 3.6 Saving a search | 14 |
| 3.7 Deleting a saved search | 14 |
| 3.8 Display properties (all types) | 15 |
| 3.9 Review properties (all types) | 16 |
| 4. Documents | 17 |
| 4.1 Viewing (on-line) | 17 |
| 4.2 Searching Key word (with-in document) | 17 |
| 4.3 Downloading Rendition | 17 |
| 5. User Journey's | 18 |
| 5.1 Downloading (Rendition) page 19 | 18 |
| 5.2 Downloading (Native file) page 20 | 18 |
| 5.3 Downloading multiple page 21 | 18 |
| 5.4 Export document meta-data page 22 | 18 |
| 5.5 Creating a collection page 23 | 18 |
| 6. User Preferences | 25 |
| 6.1 Configure Personal Preferences | 25 |
| 6.2 Change Avatar | 27 |
| Appendix A - Download Meridian Explorer Client | 28 |
| 7. Document review history | 33 |

1. Introduction

1.1 What's in this guide

This document establishes the requirements for the searching and management of Powerco's documents held in Meridian Explorer, also known as Meridian Explorer BlueCielo, referred to as application in this document. This guide contains high-level information to help you navigate the application and will outline the **views** held in the application

1.2 Who should read this guide?

This user guide applies to all Powerco staff, External contractors and consultants working for Powerco with involvement in accessing, viewing and documents held in Meridian Explorer Client.

1.3 Typographic Convention

This user guide shall have the following typography rules, which make it easy to follow:

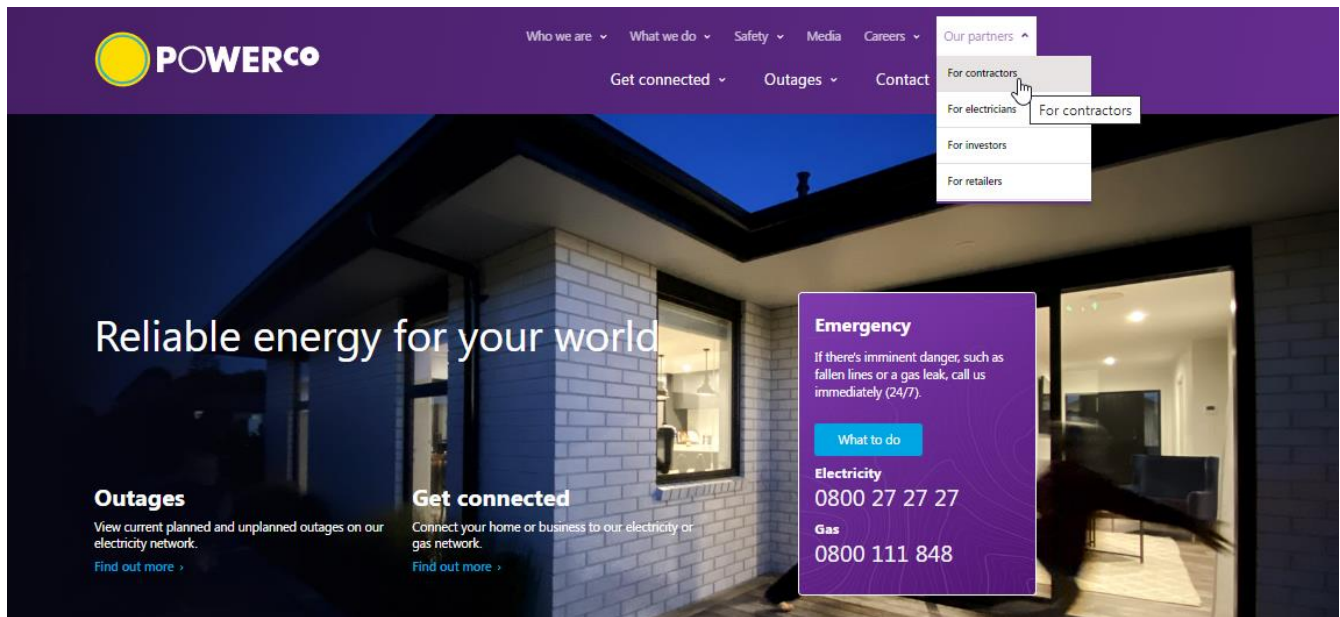
Table 1

| Typeface or Symbol | Meaning | Example |
|--|---|--|
| Bold text Segoe UI (Body) 10pt Bold | Indicates the first time use of specific terminology defined in the glossary or important term | This depends on which view you are in |
| Segoe UI (Body) 10pt | The body of the text in the document | |
| Courier New 9tp bold | The names of commands, files, and directories; on-screen computer output | Command: |
| Courier New 9tp | What you type, contrasted with on-screen computer output | Password: machine_name |
| <i>Courier New 9tp Italic</i> | Command-line placeholder: replace with a real name or value | To delete a file, type <code>rm filename.</code> |
| <i>Times New Roman 9pt Italic</i> | Book titles, new words, or terms, or words to be emphasized. | Read Chapter 6 in <i>User's Guide</i> . These are called <i>class</i> options. |
| Segoe UI (Body) 10pt Blue | The blue and underlined text shows links or just blue text highlights URL and email information | IS.Support@powerco.co.nz IS.Support@powerco.co.nz |
| [square bracket] Segoe UI (Body) 10pt | Symbol used as place holder for specific information that the user guide editor will provide | Use the [application] |
| <i>Segoe UI (Body) 10pt Italic colour purple</i> | Shows template instructions to User Guide creator/editor, | <i>Describe what this guide contains</i> |

1.4 Accessing application

Permission is required to access the Powerco documents held in Meridian Explorer Client application. If you are unable to log into the application, please contact IS.Support@Powerco.co.nz

1.4.1 Access is available via the Powerco web Home page, Our partners dropdown >For contractors



1.4.2 From the For Contractors landing page users with approved access can view Powerco Web applications



For contractors

Working on our networks

The following web application links are for Powerco-approved contractors use only.

If you're already a Powerco-approved contractor and require access to our web applications, please fill in our web applications access form by clicking [here](#) and notify your Powerco Manager.

Once your form has been verified, you will receive an email giving you access.

Contractors not working directly for Powerco will not be given access to any applications.

Web applications

- [CIW Electricity](#)
- [CIW Electricity Retailers](#)
- [CWM and NOM Online](#) **2**
- [CWMS](#)
- [Gas Contractor Portal](#)
- [Gas Pricing Website](#)
- [GIS Portal](#)
- [NAPA](#)
- [Powerco's Learning Hub](#)
- [Powerco Protection Systems Hub](#)
- [Restore](#)
- [Powerco Drawing Management \(EDMS\)](#) **3**
- [Voyager](#)

By accessing the eCopy drawings and/or associated documents on, or from this website you agree to and acknowledge the following terms and conditions of use:

1. The drawings are made available for information only and solely for use in relation to project work currently being carried out by you or your company for Powerco
2. Powerco owns all rights in the drawings and they may not be copied, reproduced or distributed in any way or for any other purpose whatsoever.
3. While care has been taken to ensure that information contained within the drawings is accurate at the time of publication, changes in circumstances after the time of publication may impact on the current accuracy of this information. Powerco gives no warranty as to the accuracy of any information or advice contained in the drawings and vies no warranty that they are fit for your intended use.
4. If you require a master copy of any of these drawings for design modification please log a request as per the Powerco Electricity Engineering Drawing Standard 360S019.

EDMS runs on Edge (preferred browser), Chrome and Firefox.

Table 2

| | Name | Description |
|----------|-----------------------------------|---|
| 1 | Web application access form | <ul style="list-style-type: none"> • Link to on-line form, complete if you require access to Meridian Explorer application |
| 2 | CWM and NOM Online | <ul style="list-style-type: none"> • Access link to Contract Works Manual and Network Operations Manual Online |
| 3 | Powerco Drawing Management (EDMS) | <ul style="list-style-type: none"> • Access link to Powerco Drawing Management system |

Supporting links

- 1** [Web applications access form](#) >
- [beforeUdig - cable locations](#) >
- [NZECP 34](#) >
- [Decommissioning connections](#) >
- [WorkSafe](#) >

User guides/QRGs

- [Service provider Induction](#) >
- [CWM and NOM explorer client user guide](#) >
- [Powerco Drawing Management explorer client user guide](#) >
- [A guide to working safely on roadsides](#) >

1.4.3 Once you have selected the application view you require, you will then need to complete required security login. The number of requested Username and Password dialog boxes will depend on whether you have logged in before, your browser and how your system is setup.

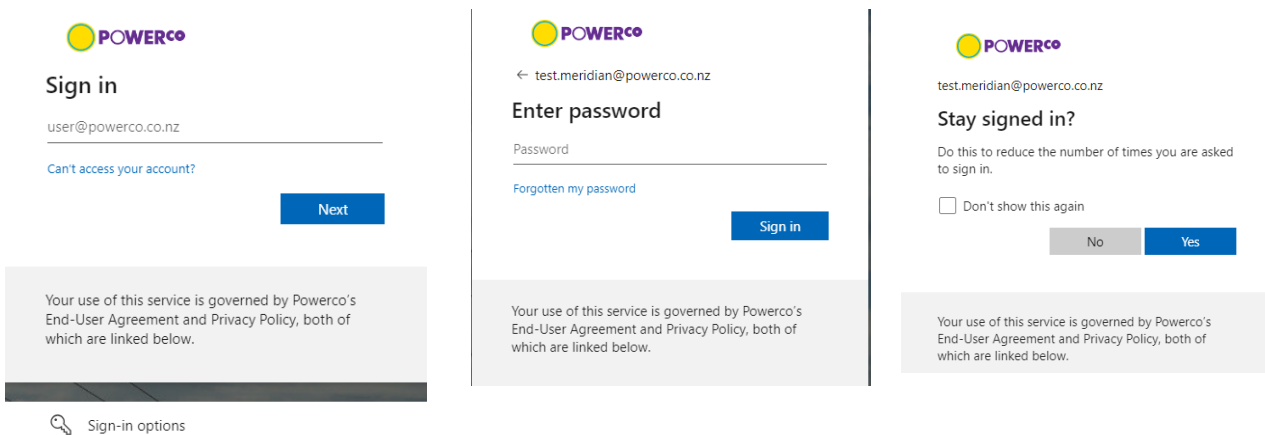
If it is the first time you are logging into the application, you may be prompted to select your account and enter your password. Once saved, you won't need to do this for another 14 days.


Ensure you access a Powerco application within 60 days of your last login. If you do not your access will be blocked as per Powerco Security Policy.

If this happens email IS.Support@Powerco.co.nz to unblock your account.

All accounts are reviewed every 12 months by the approving Powerco manager.

The Details you will need to enter are the **Powerco identifier email address** (firstname.last@Powerco.co.nz) and **Powerco Password**. The browser may remember your details, choose to log in as "another user" with Powerco email address.



 Sign-in options

If you only see a blank page, please minimise what is displayed as the dialog box maybe hidden behind. Then you will be asked for you user credentials,

1.5 Naming convention

The naming convention of files in the Meridian Explorer Client follow a hierarchy of information unique to the documents with-in the specific folder, i.e. unique ID. (filename).

This hierarchy will depend on what type of documents you are looking at.

Refer to specific sections below for further information.

1.6 Document taxonomy

The structure that the documents are stored in has the following levels.

Level 1 – Geographical or Area of works

Level 2 – Site type or Job type

Level 3 – More detail

There is no specific **tagging** applied to the documents in this application.

1.7 Technical support

If the function you are trying results in an error, screenshot the error and send to IS.Support@Powerco.co.nz

1.8 Definitions

Technical terms used in this guide,

Table 3

| Term | Definition |
|----------------------|--|
| eCopies | <ul style="list-style-type: none"> PDF file format of document for reference |
| Native format | <ul style="list-style-type: none"> Format of the document from the application that created it |
| Rendition | <ul style="list-style-type: none"> PDF file format of document for download |
| Tagging | <ul style="list-style-type: none"> key grouping of metadata tag to return all documents with a specific tag to be returned during a key word search |
| Thumbnail | <ul style="list-style-type: none"> Snapshot type image of document, not always clear. Gives the user an indication of what the document looks like before viewing |
| Tiles | <ul style="list-style-type: none"> on the home page you will see view options for different types of documents, these are tiles |
| User / Viewer | <ul style="list-style-type: none"> The persons using the application to review, view or download a document held in the application |
| View | <ul style="list-style-type: none"> Views are created to show specific document types, e.g., written standards, drawings |

2. Home page and Landing page - Application

2.1 Home page



Table 4

| | Name | Description |
|---|--------------------------------------|--|
| 1 | Views Favorites Saved Searches | <ul style="list-style-type: none"> Click to display the list of available Views, this will depend on your security access level This is not currently setup for saving Click to display your saved searches, users to set up, refer section 3.6 |
| 2 | Recently used | <ul style="list-style-type: none"> Tiles you have recently used to view documents |
| 3 | User profile | <ul style="list-style-type: none"> Click to view your profile |
| 4 | Recent searches | <ul style="list-style-type: none"> Displays the last searches you did |

The number of **tiles** on the home page will depends on your viewing access.

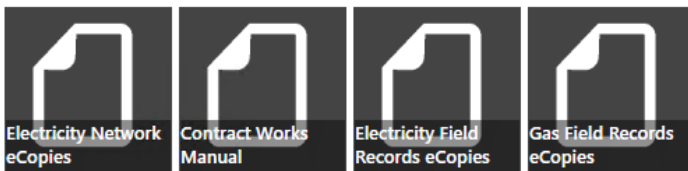


Table 5

| | Name | Description |
|--|--|---|
| | Contract Works Manual | <ul style="list-style-type: none"> This tile contains PDF renditions of Powerco written standards, these are available for contractors working on the Powerco Network |
| | Electricity Field Records eCopies | <ul style="list-style-type: none"> This tile contains PDF renditions of historical Electricity documents of the now Powerco owned network |
| | Gas Field Records eCopies | <ul style="list-style-type: none"> This tile contains PDF renditions of historical Gas documents of the now Powerco owned network |
| | Electricity Network eCopies | <ul style="list-style-type: none"> This tile contains PDF renditions of the current Electricity documents of assets on the Powerco network |

2.2 Landing page

Once you select the required tile, this will take you to the landing page with the documents you wish to view. The areas of the landing page are as described in table 4 below.

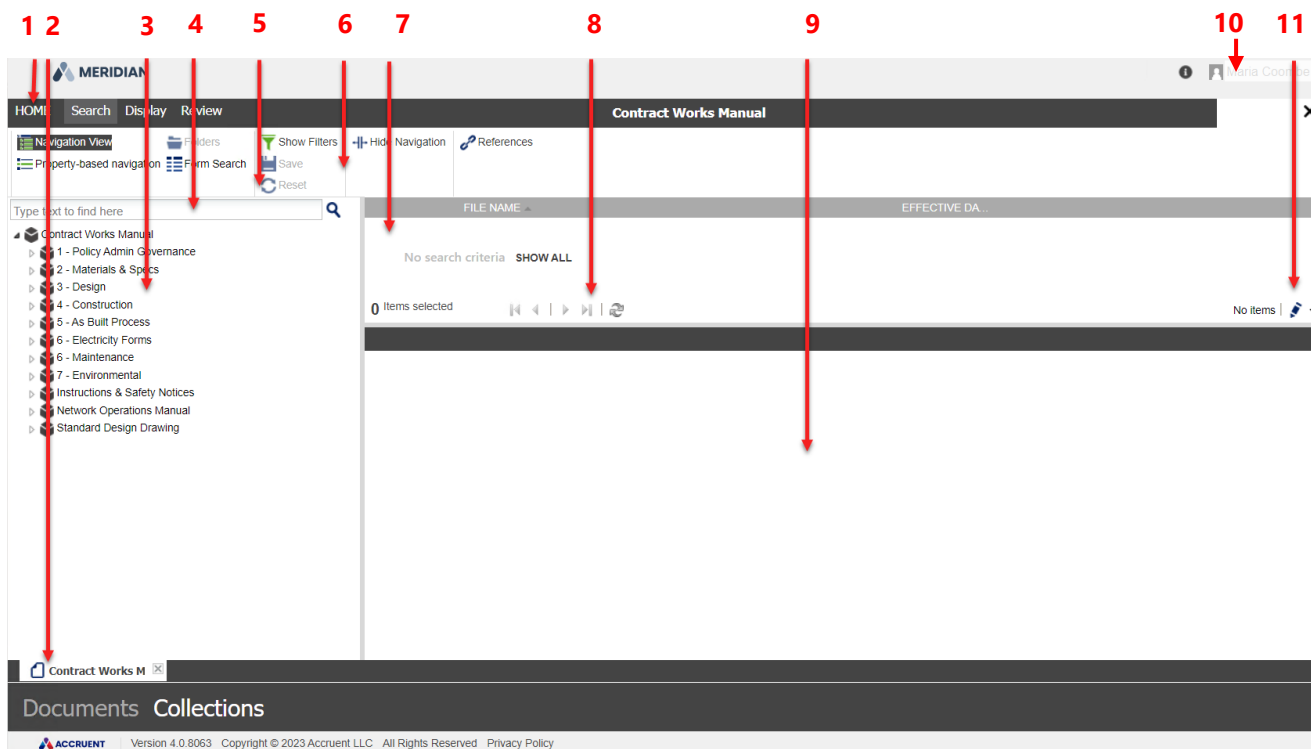



Table 6


| | Name | Description |
|---|--------------------|--|
| 1 | Home button | <ul style="list-style-type: none"> Click to return to the Home page |
| 2 | Tab bar | <ul style="list-style-type: none"> Shows tabs for the open Views or items |
| 3 | Navigation pane | <ul style="list-style-type: none"> Shows the selected navigation method for the current View: Navigation View, property-based navigation, folder navigation, and form search. |
| 4 | Quick Search | <ul style="list-style-type: none"> Type in document ID or key word in search bar |
| 5 | Reset | <ul style="list-style-type: none"> Reset after a search, to clear all filters from the last search |
| 6 | Ribbon | <ul style="list-style-type: none"> Shows commands available in the current View or for the selected search results |
| 7 | Results pane list | <ul style="list-style-type: none"> Search results |
| 8 | Results navigation | <ul style="list-style-type: none"> Buttons to Reset after a search, to clear all filters from the last search move to First previous, next or last record |
| 9 | Property Pages | <ul style="list-style-type: none"> Tabs to switch between the Property Pages available for the selected document. |

| | Name | Description |
|----|----------------------|---|
| 10 | Personal Preferences | <ul style="list-style-type: none"> Click to change your personal preferences |
| 11 | Page Size | <ul style="list-style-type: none"> The text will indicate the number of total files your search has found. Highlight the  icon to show the options of number of files to view per page |

2.3 Searching for a document

Documents can be searched for by Navigation View, Quick Search or Form Search. Explained further in section 3.3. If an icon is grey this means the function is not available.

Table 7

| | Name | Description |
|--|-----------------------|---|
| | Navigation View | <ul style="list-style-type: none"> When searching with navigation view, you are manually searching through the hierarchy of the file structure |
| | Quick Search | <ul style="list-style-type: none"> When searching with quick search, you use the document unique ID or title |
| | Form Search | <ul style="list-style-type: none"> When searching with form search, you are searching in a specific meta-data field |
| | Form Search (advance) | <ul style="list-style-type: none"> Click the  button in the lower left-hand corner to access the advanced Form Search. The advanced Form Search gives greater flexibility in your search by allowing you to specify the joining operators "And" and "Or" to build complex queries on multiple properties, change the criteria of the search from "contains" the entered value to "must equal" the entered value, and relist the same property to be searched for different values simultaneously. |
| | Save | <ul style="list-style-type: none"> Saves the current document search so you can access it again |
| | Reset | <ul style="list-style-type: none"> Reset after a search, to clear all filters from the last search |

2.4 Saving a search

Once you have completed a search you will be able to save this group of documents. You can also use navigational search to a folder level and save.

Your saved searches can be accessed by clicking **"Saved Searches"** on the home page.

3. Navigation

This section describes how documents would be searched for by the document type or meta-data available.

3.1 Browsing

When browsing you will have a navigational structure to step through or you can browse by document type. You will need to know what the document is about or the document type. Refer section below, Different types of documents and their meta-data.

Note not all documents have all meta-data fields completed.

3.2 Different types of documents and their meta-data

3.2.1 The different types of documents held in Contracts Works Manuals are

- Contract Works Manuals
- Instructions & Safety Notices
- Network Operations Manuals
- Standard Design Drawings

The different meta-data held on the above document types are,

Table 8

| Field | Description |
|--------------|---|
| Title | <ul style="list-style-type: none"> • When searching with navigation view, you are manually searching through the hierarchy of the file structure |
| Document No. | <ul style="list-style-type: none"> • When searching with quick search, you use the document unique ID or title |

3.2.2 The different types of documents held in Electricity Field Records eCopies are,

- Distribution
- Engineering drawings
- ESAs (Electricity Supply Authority)
- Field Books
- Line Condition Reports (Wairarapa)
- Plot Sheets
- Reticulation
- Service Cards
- Work Sheets (Taranaki)

The different meta-data held on the above document types are,

Table 9

| Field | Description |
|-------------|---|
| Record Type | <ul style="list-style-type: none"> Type of document, refer list above |
| Street | <ul style="list-style-type: none"> Street address where asset information is related to. This can contain street numbers on some documents |
| Suburb | <ul style="list-style-type: none"> Suburb where asset information is related to |
| City | <ul style="list-style-type: none"> City where asset information is related to |

- The different types of documents held in Gas Field Records eCopies view are,
- Field Books
- Job Cards
- Pipe Test Records
- Reticulation
- Service cards

The different meta-data held on the above document types are,

Table 10

| Field | Description |
|-------------|---|
| Region | <ul style="list-style-type: none"> Region where asset information is related to |
| Record Type | <ul style="list-style-type: none"> Type of document, refer list above |
| Street | <ul style="list-style-type: none"> Street address where asset information is related to. This can contain street numbers on some documents |
| Suburb | <ul style="list-style-type: none"> Suburb where asset information is related to |
| City | <ul style="list-style-type: none"> City where asset information is related to |

3.2.3 The different types of documents held in Electricity Network eCopies view are,

- Communications
- Points of Supply
- Schematic
- Switching Stations
- Voltage Regulators
- Weather Stations
- Zone Substations

The different meta-data held on the above document types are,

Table 11

| Field | Description |
|---------------------|--|
| File Name | <ul style="list-style-type: none"> The name the files is known as. |
| Document Category | <ul style="list-style-type: none"> Your option is Drawing, refers to the area of the repository the documents are held |
| Drawing Title | <ul style="list-style-type: none"> This refers to the 3rd title line on a drawing title block |
| Discipline | <ul style="list-style-type: none"> This refers to the drawing discipline in the title block, i.e., Civil, Electrical |
| Dwg_Location | <ul style="list-style-type: none"> This refers to the region which the asset document details |
| Old Document Number | <ul style="list-style-type: none"> This refers to the original drawing number the document was known by, i.e., Manufacturers number, previous network owner |
| Title Line 1 | <ul style="list-style-type: none"> This refers to the first line in the drawing title block, i.e., Zone Substation |
| Title Line 2 | <ul style="list-style-type: none"> This refers to the second line in the drawing title block, the site name where the asset is sited |

3.3 Searching (with-in a view)

The different search functions for a document in a view can be completed as follows. Read in conjunction with section 2.3

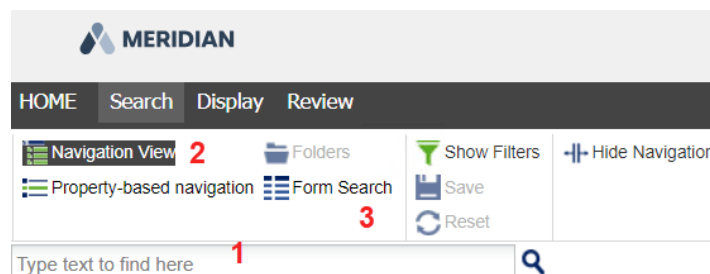


Table 12

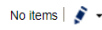
| Name | Description |
|--------------------------|--|
| 1 Quick search | <ul style="list-style-type: none"> The Quick Search bar is a contains search on all available meta-data fields for the document type. This search function is used when you either know the document ID or you are looking for a specific key word held in the meta-data. |
| 2 Navigation View | <ul style="list-style-type: none"> The Navigation View search, this shows the hierarchical tree-structure. This search function requires the user to step through the structure levels to find the region, asset type and specific document required. |
| 3 Form Search | <ul style="list-style-type: none"> Form Search shows the specific meta-data in the view to search on. This search function required the user to know a part of parts of the document title or meta-data. |

3.4 Results Pane List from searching (all types)

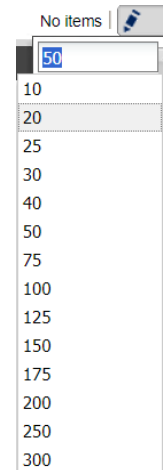
Once you have completed any search type the results will show in the Results pane list on the right-hand side. The displayed meta-data will depend on which view you are in. Not all searchable meta-data will be displayed in this pane.

Before starting another search select  **Reset**, this clears the previous search.

3.5 Navigate the results list


The number of displayed items in the results pane list will depend on the page setup. This can be changed by use of the dropdown on the right-hand side. 

The results navigations arrows will step you through the search results. *Refer Table 6*

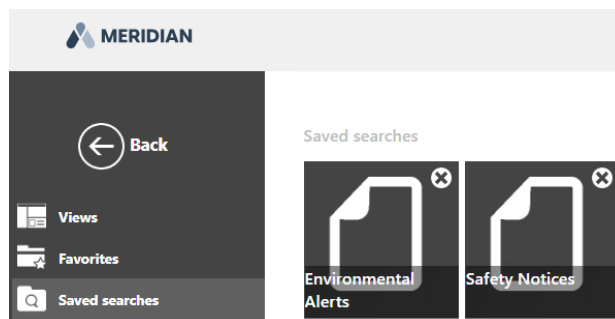



3.6 Saving a search

Saving a search, once you have completed a search you can save the search criteria to the Home page.

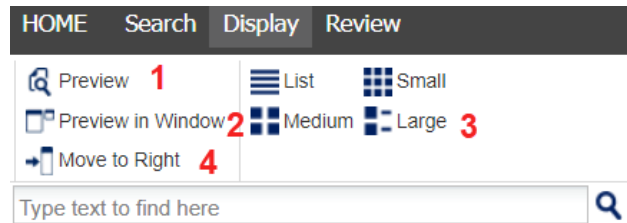
Highlight the folder required and select  **Save** icon on the search tab. Complete the "save filter" dialog box with a name that will be saved to your "saved searches" view.

3.7 Deleting a saved search




When you no longer require the saved search, go to the saved searches on the home page and select the  icon to remove. You will see a "warning" dialog box appear asking if you are sure you wish to remove the item.

3.8 Display properties (all types)

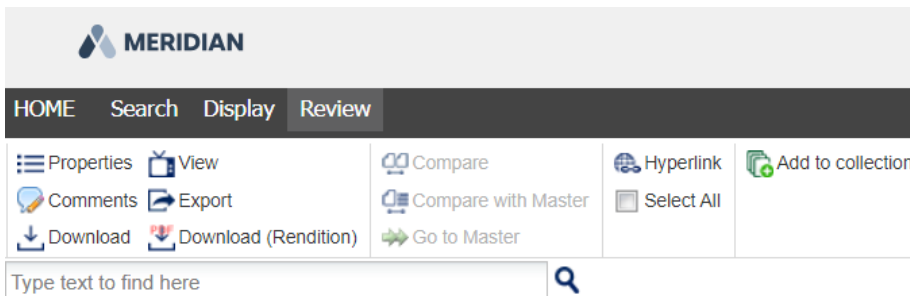


Select a document to make icons available.

Table 13


| | Name | Description |
|---|----------------------------|--|
| 1 | Preview | <ul style="list-style-type: none"> The Preview icon, this will toggle the selected document property pages on and off. The General tab icon  in the property pane will preview the document |
| 2 | Preview in window | The Preview in window icon, this will open a separate browser window to display the ' Review ' tab property pages of the selected document. |
| 3 | List, Medium, Small, Large | <ul style="list-style-type: none"> The List, Medium, Small, Large icons, allow the user to change the way the results are displayed |
| 4 | Move to Right | <ul style="list-style-type: none"> This moved the property pane from the bottom to the right side of screen |

3.9 Review properties (all types)



Select a document to make icons available. Icons in gray are not available.

Table 14

| Name | Description |
|----------------------------|---|
| Properties | <ul style="list-style-type: none"> Display's property pane full screen,  icon will preview the document. On some documents this could be a thumbnail/snapshot image of the document |
| Comments | <ul style="list-style-type: none"> Display's document for on-line review and comments pane |
| Download ** (Rendition) | <ul style="list-style-type: none"> Allows the user to download the rendition (PDF) and view off-line |
| View | <ul style="list-style-type: none"> Preview the selected document |
| Download | <ul style="list-style-type: none"> Allows the user to download documents in native format (not PDF) |
| Hyperlink | <ul style="list-style-type: none"> Document hyperlink available for user to send to other users that have access to Meridian Explorer Client |
| Export ** | <ul style="list-style-type: none"> Enables user to create to export a report of selected documents meta-data |
| Add to collection ** | <ul style="list-style-type: none"> Enables user to create a group of documents |


** Refer section 5 for Quick Reference Guide (QRG) pages

If you require further steps on the application tabs, request this via email to IS.Support@Poweco.co.nz

4. Documents

Documents in this application are predominantly renditions (PDFs) for viewing on-line or downloading.

Native format files can be requested via email to IS.Support@Powerco.co.nz.

Documents with formulas in Contracts Works Manuals have formulars a native file is available to download. The icon  will be displayed.

4.1 Viewing (on-line)

Once you have found the required document you can view on-line by picking the format icon in the results pane. You will then see the property page. On the general tab select the icon or thumbnail to view document.



Select this icon to view on-line

4.2 Searching Key word (with-in document)

Documents can be searched for key words if the PDF rendition was created from an application e.g., AutoCAD, Microsoft.

If the PDF rendition was created from a scanned paper document key word search will not work.

4.3 Downloading Rendition

Download rendition files from the '**Review**' tab, this will download a single document you can open the file or go to file manager and copy PDF rendition to required location.

Export Document Metadata, refer 5.1 *QRG – Download (Rendition)*

5. User Journey's

The following Quick Reference Guides (QRGs) provide the user with clear visual and minimum written instructions necessary to carry out the task.

| | | |
|------------|----------------------------------|---------------------------------------|
| 5.1 | Downloading (Rendition) | <u>page 19</u> |
| 5.2 | Downloading (Native file) | <u>page 20</u> |
| 5.3 | Downloading multiple | <u>page 21</u> |
| 5.4 | Export document meta-data | <u>page 22</u> |
| 5.5 | Creating a collection | <u>page 23</u> |

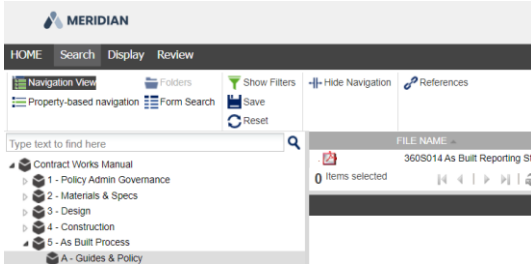
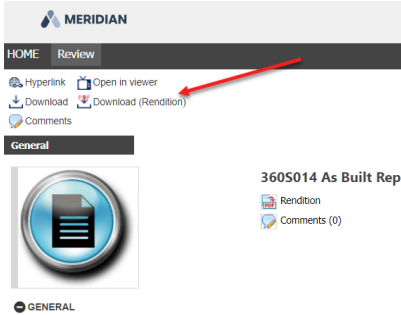
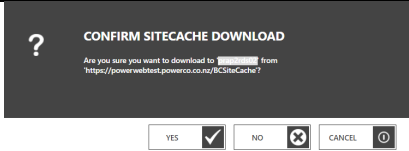
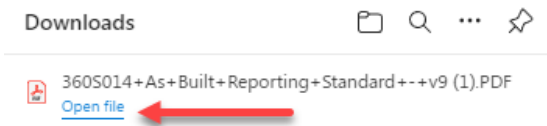
Introduction

The 'Downloading (Rendition)' Quick Reference Guide is designed to provide the user with clear visual and minimum written instructions necessary to carry out the task.

Pre-requisites

The user will have access and have found the document required to download.

Steps

| | |
|---|--|
| <p>Step 1</p> <ul style="list-style-type: none"> • Select single document icon for downloading • If you select the title you will stay on the same screen and not preview the document |  |
| <p>Step 2</p> <ul style="list-style-type: none"> • On Review tab • Select Download (Rendition) |  |
| <p>Step 3</p> <ul style="list-style-type: none"> • Select no to download to file manager Downloads folder |  |
| <p>Step 4</p> <ul style="list-style-type: none"> • You will see the Downloads dialog prompt • Open file and save to your file manager |  <p>Downloading (Rendition) completed</p> |

Note:

Steps to download multiple documents refer 5.3 'QRG - Downloading multiple'.

Introduction

The 'Downloading (Native file)' Quick Reference Guide is designed to provide the user with clear visual and minimum written instructions necessary to carry out the task.

Pre-requisites

The user will have access and have found the document required to download. Only selected vaults have native files.

Steps

| | |
|--|--|
| <p>Step 1</p> <ul style="list-style-type: none"> • Select document icon for downloading. • If you only select the title you will stay on the same screen and not preview the document | |
| <p>Step 2</p> <ul style="list-style-type: none"> • On Review tab • Select Download (Rendition) | |
| <p>Step 3</p> <ul style="list-style-type: none"> • You will see the Downloads dialog prompt • Open file and save to your file manager <p>Downloading (native file) completed</p> | |

Note:

The steps to download multiple documents refer 5.3 'QRG - Downloading multiple'.


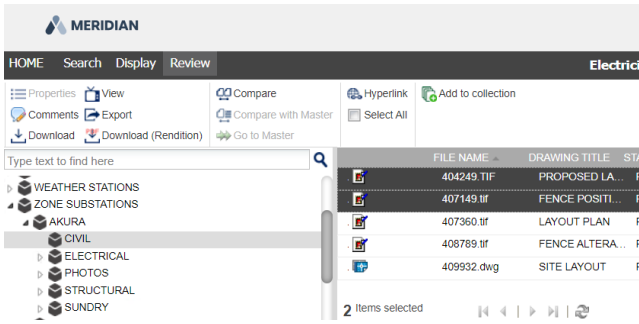
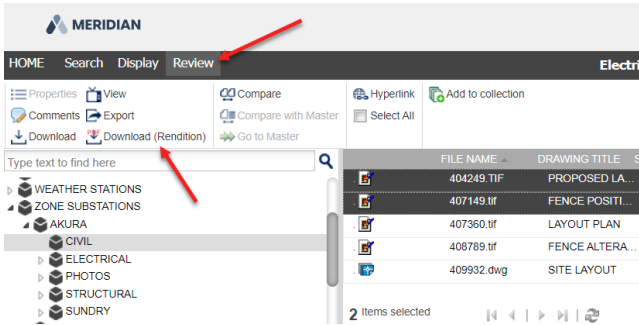

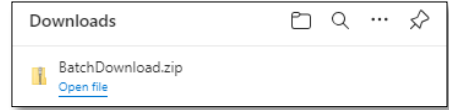
Introduction

The 'Downloading multiple' Quick Reference Guide is designed to provide the user with clear visual and minimum written instructions necessary to carry out the task.

Pre-requisites

The user will have downloaded the Meridian Explorer Client from Powerco web site Home page, refer appendix A.

Steps

| | |
|--|--|
| <p>Step 1</p> <ul style="list-style-type: none"> Select multiple documents by file name <p>If you select the  icon you will be taken to a preview screen for selected document</p> |  |
| <p>Step 2</p> <ul style="list-style-type: none"> Select Review tab Select Download (Rendition) |  |
| <p>Step 3</p> <ul style="list-style-type: none"> Select yes to download all files to local work space Select no to download to file manager Downloads folder |  |
| <p>Step 4</p> <ul style="list-style-type: none"> You will see the Downloads dialog prompt Select Open file this will take and save to your file manager |  <p>Downloading multiple files completed</p> |

Meridian Explorer QRG - Export document meta-data



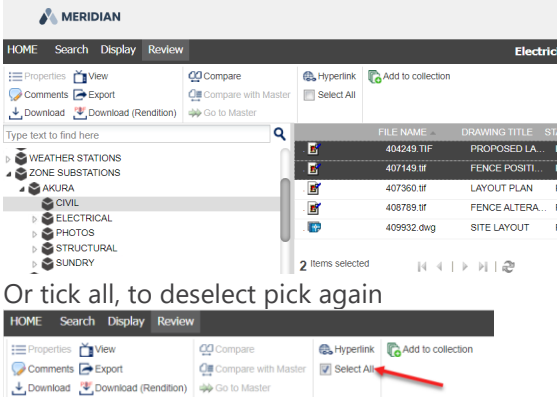
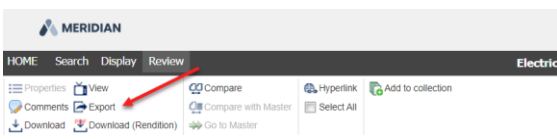
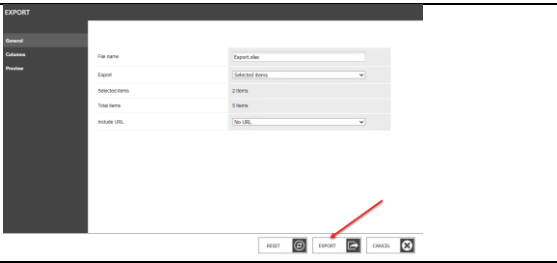
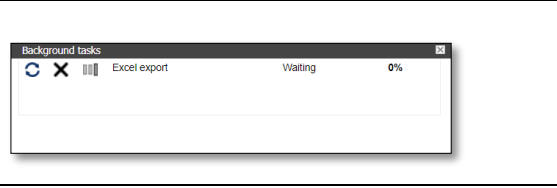
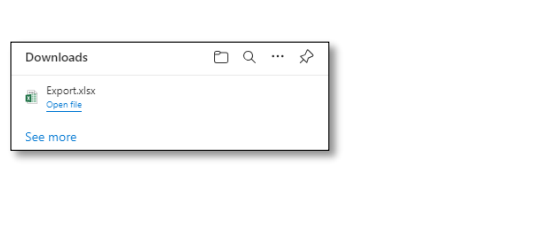
Introduction

The 'Export document meta-data' Quick Reference Guide is designed to provide the user with clear visual and minimum written instructions necessary to carry out the task. The user would use this spreadsheet of meta-data from the selected drawings for quick reference or when requesting **native files** for modification.

Pre-requisites

The user will have selected the files or created a collection from which the export of meta-data will come from. Refer to 'QRG - Add to a collection' for information on this step.

Steps

| <p>Step 1</p> <ul style="list-style-type: none"> Select multiple documents by file name or Select all files in Results pane On Review tab select Export |  <p>Or tick all, to deselect pick again</p>  <p style="text-align: right;">Export</p> | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|---|----------|------------------|--------------|---|---|---|-----------|---------------|-------|--------------|--------------|---|------------|----------------------|----------|------------------|-------|---|------------|---|----------|------------------|-------|
| <p>Step 2</p> <ul style="list-style-type: none"> The Export dialog box will appear <p>No additional information is required select Export</p> |  | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Step 3</p> <ul style="list-style-type: none"> The Background tasks dialog box will appear |  | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Step 4</p> <ul style="list-style-type: none"> The Downloads dialog box will appear Select open file to open the excel file |  | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Step 5</p> <ul style="list-style-type: none"> Sample of Excel file export from Electricity Network eCopies | <table border="1" data-bbox="502 1870 1101 1960"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> </tr> <tr> <th>1</th> <th>File Name</th> <th>Drawing Title</th> <th>State</th> <th>Title Line 1</th> <th>Title Line 2</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>404249.TIF</td> <td>PROPOSED LANDSCAPING</td> <td>Released</td> <td>ZONE SUBSTATIONS</td> <td>AKURA</td> </tr> <tr> <td>3</td> <td>407149.tif</td> <td>FENCE POSITIONS FOR TRANSFORMER REMOVAL</td> <td>Released</td> <td>ZONE SUBSTATIONS</td> <td>AKURA</td> </tr> </tbody> </table> <p>Export document meta-data completed</p> | | A | B | C | D | E | 1 | File Name | Drawing Title | State | Title Line 1 | Title Line 2 | 2 | 404249.TIF | PROPOSED LANDSCAPING | Released | ZONE SUBSTATIONS | AKURA | 3 | 407149.tif | FENCE POSITIONS FOR TRANSFORMER REMOVAL | Released | ZONE SUBSTATIONS | AKURA |
| | A | B | C | D | E | | | | | | | | | | | | | | | | | | | | |
| 1 | File Name | Drawing Title | State | Title Line 1 | Title Line 2 | | | | | | | | | | | | | | | | | | | | |
| 2 | 404249.TIF | PROPOSED LANDSCAPING | Released | ZONE SUBSTATIONS | AKURA | | | | | | | | | | | | | | | | | | | | |
| 3 | 407149.tif | FENCE POSITIONS FOR TRANSFORMER REMOVAL | Released | ZONE SUBSTATIONS | AKURA | | | | | | | | | | | | | | | | | | | | |

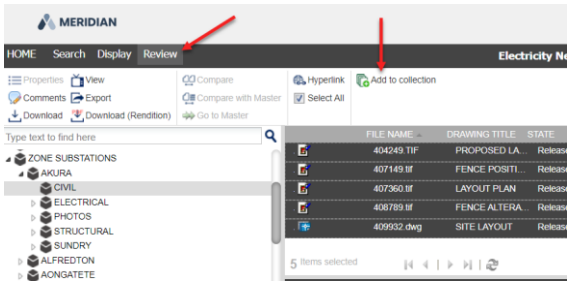
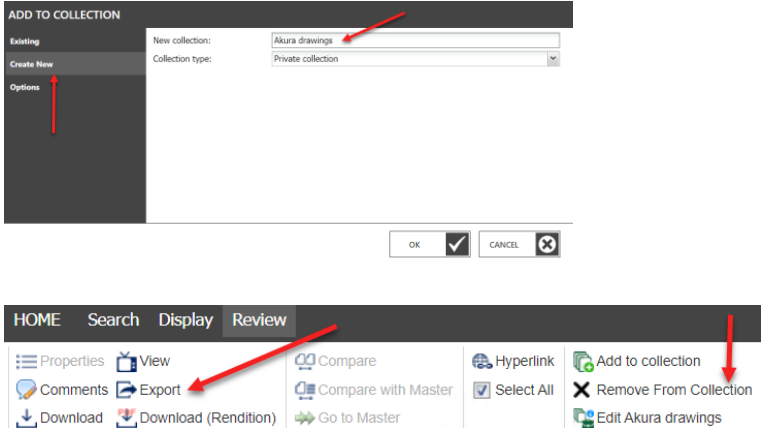
Introduction

The 'Creating a collection' Quick Reference Guide is designed to provide the user with clear visual and minimum written instructions necessary to carry out the task. A collection is a saved group of documents, like a Saved Search refer 3.6. The difference is that a Saved Search can be modified over a time by adding or removing documents at will, while the documents grouped in a Collection remain static.

Pre-requisites

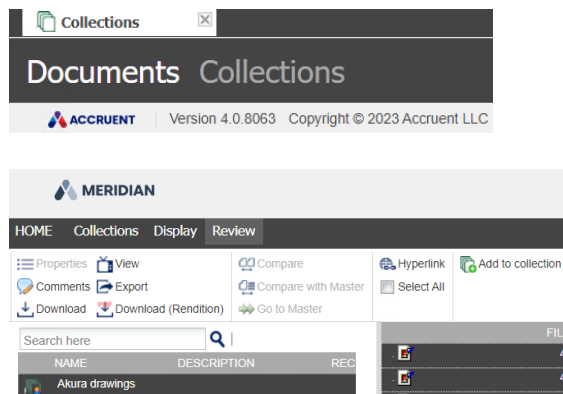
The user will know how to search for a file. Refer section 3 Navigation

Steps

| | |
|--|---|
| <p>Step 1</p> <ul style="list-style-type: none"> • Select multiple documents by file name • On Review tab select Add to collection |  |
| <p>Step 2</p> <ul style="list-style-type: none"> • The ADD TO COLLECTION dialog box will appear • Select create New and type a name for the collection in the New collection box • Select if collection is Private Or Shared pick OK • You will then only see the option Export to pick <p>Note; You can now Export your collection of information or add more files to your collection, to export refer <i>QRG - Export document meta-data</i></p> |  |

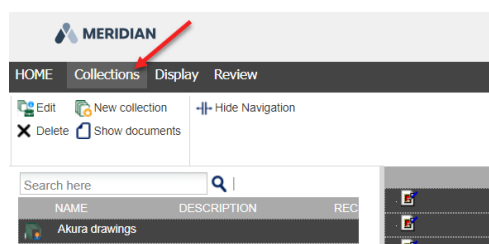
Step 3

- To view collection, select **collections** at the bottom left-hand corner of Meridian Explorer
- To add more documents to the collection, repeat from **Step 1**



Step 4

- To remove collection, view collection and select specific collection pick **Delete**



Creating a collection completed

6. User Preferences

There is minimal you can change as a user, though there are some personal preferences you can change. Refer below for column and download options.

6.1 Configure Personal Preferences

At the top right corner of any page, click your name. Your personal profile pages appear. **General** user preference and **Options** (no selectable items). Select **x** to close page.

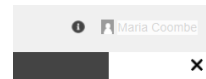
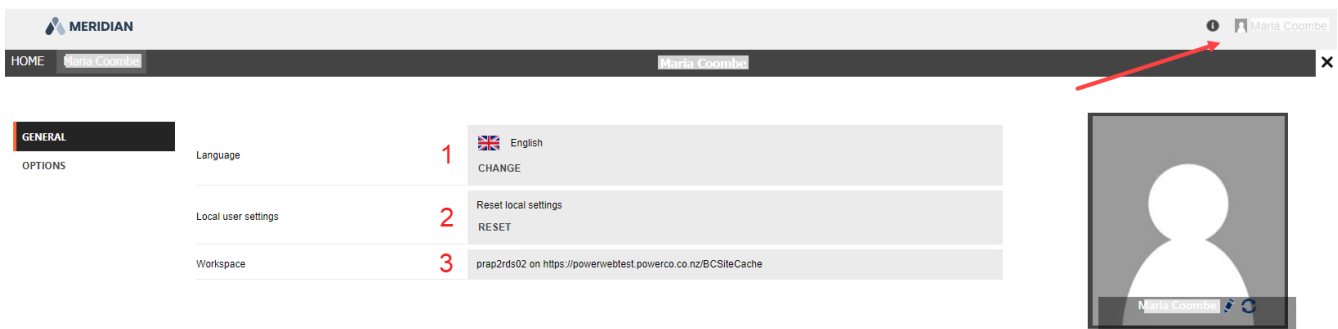


Table 15

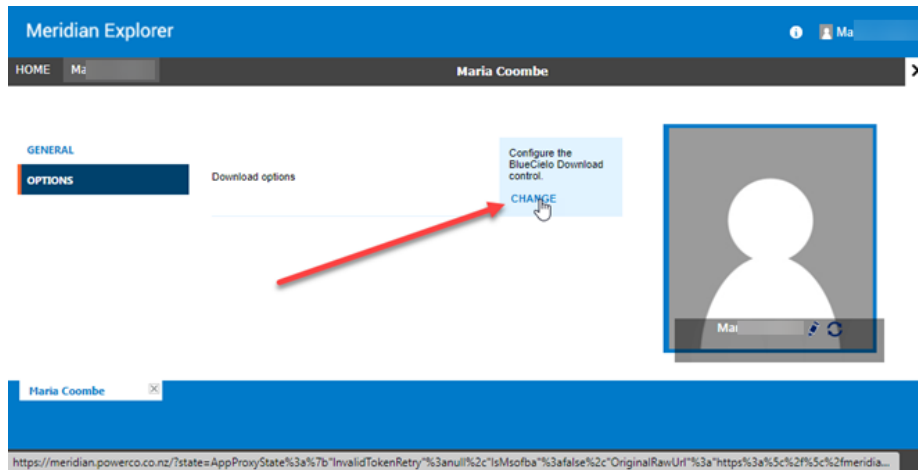
| | Name | Description |
|---|---------------------|---|
| 1 | Language | <ul style="list-style-type: none"> Select CHANGE, this will allow you to choose a language option for the user interface (not data) shown |
| 2 | Local user settings | <ul style="list-style-type: none"> Select RESET to remove your personal settings and restore the default settings |
| 3 | Workspace | <ul style="list-style-type: none"> Computer name of the location of your preferred local workspace |



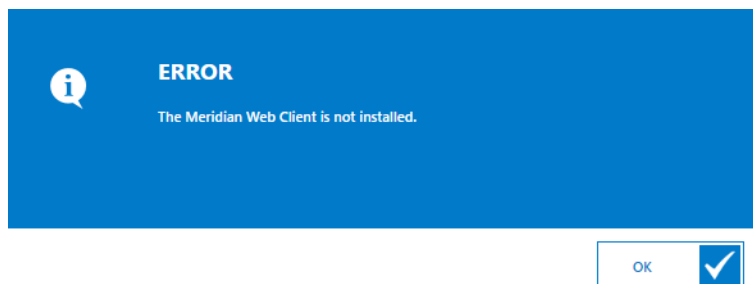
OPTIONS user preference options

Table 16

| | Name | Description |
|--|------------------|--|
| | Download options | <ul style="list-style-type: none"> Select CHANGE, you will only be able to change this setting if you have downloaded the Meridian Explorer Client, only required for multiple downloads |



You will see this **Error** dialog box if you try to change the Download option if you have not installed the Meridian Explorer Client which is only required if you need to download multiple documents, refer Appendix A.

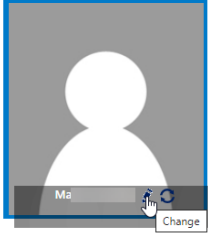
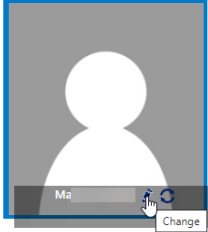
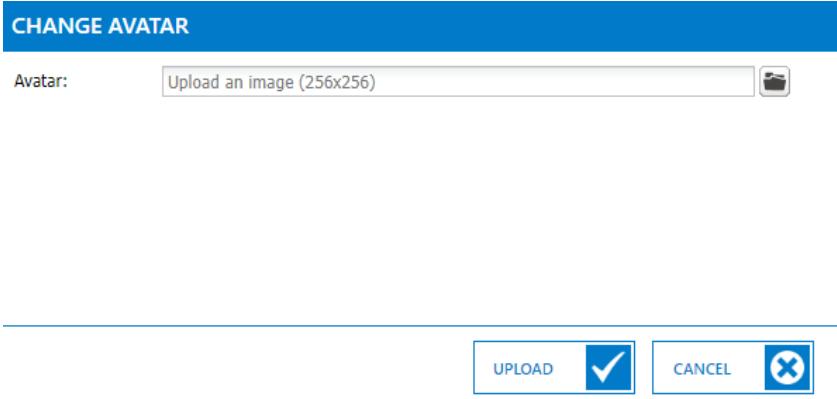


If you have downloaded Meridian Explorer Client, you will be able to change the download path.

6.2 Change Avatar

Your avatar is the image that appears next to our name in Meridian Explorer application. If you do not upload an image, the default image

Steps

| | |
|---|--|
| <p>Step 1</p> <ul style="list-style-type: none"> Select your name on top |  |
| <p>Step 2</p> <ul style="list-style-type: none"> Select the change icon |  |
| <p>Step 2</p> <ul style="list-style-type: none"> The CHANGE AVATAR dialog box appears. Upload image |  |

Appendix A - Download Meridian Explorer Client

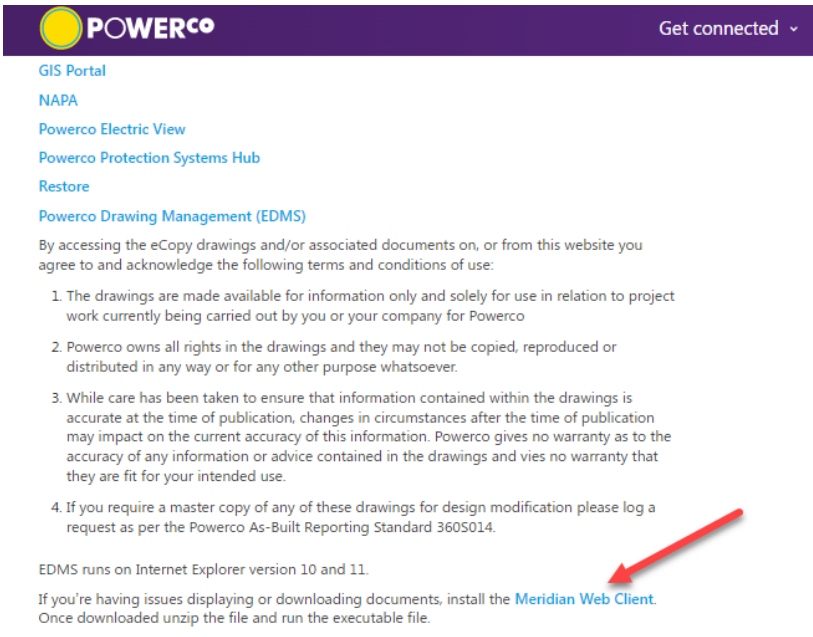
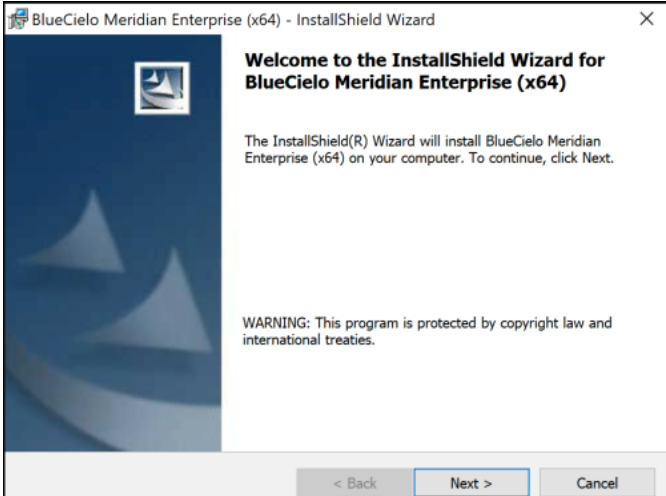
Introduction

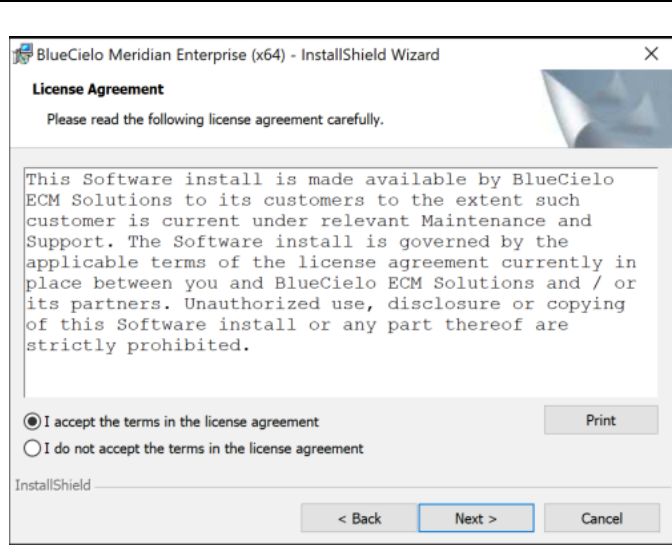
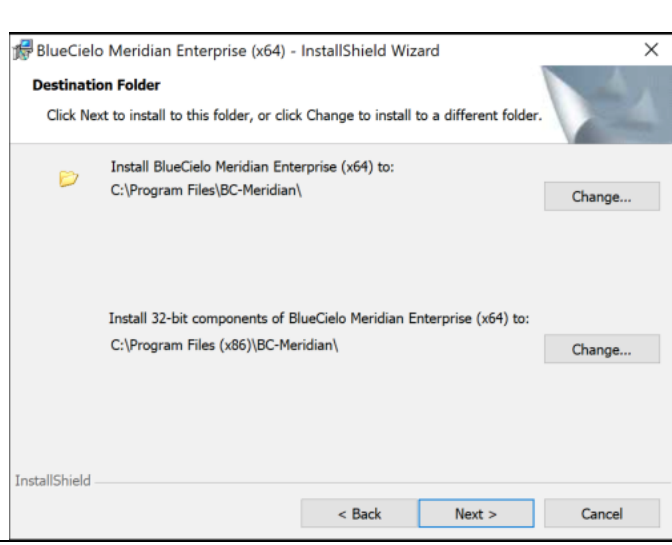
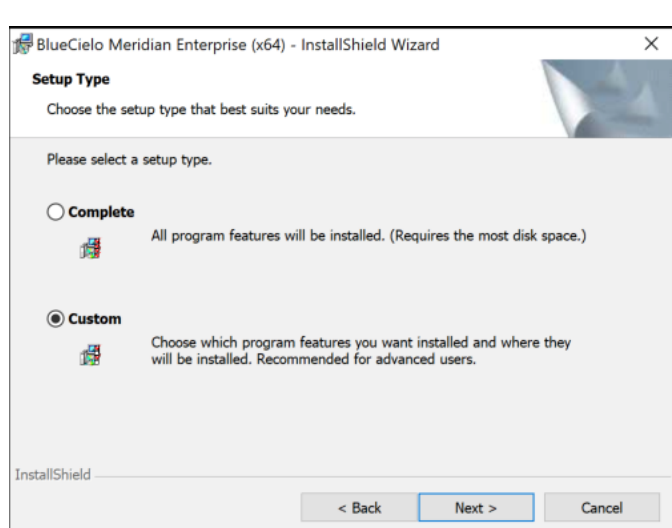
The appendix A 'Download Meridian Explorer Client' is designed to provide the user with clear visual and minimum written instructions necessary to carry out the task.

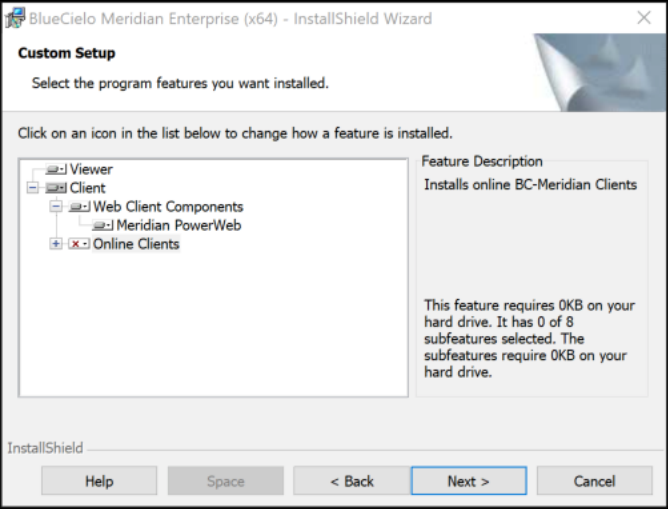
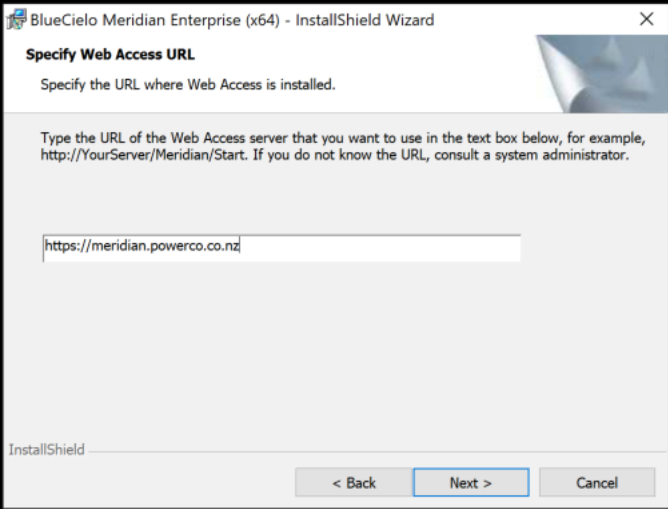
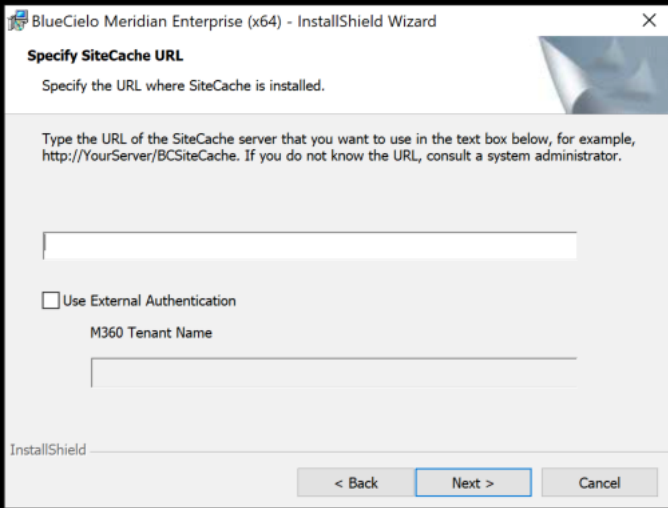
Pre-requisites

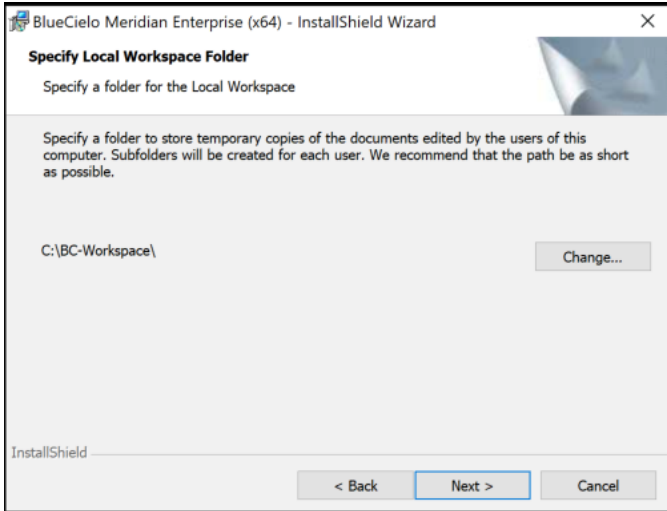
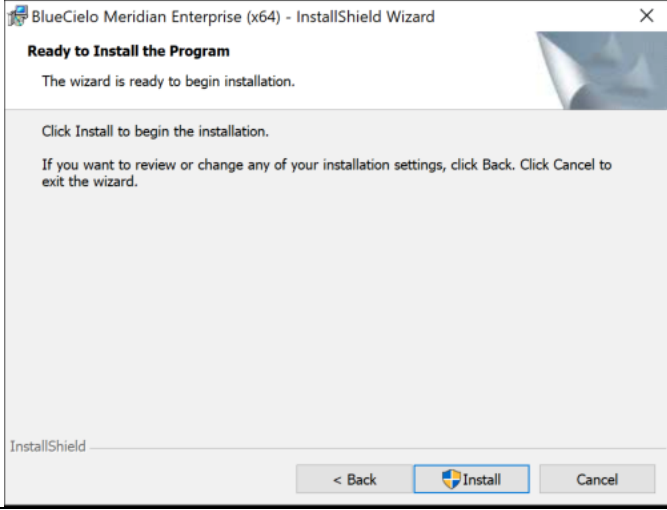
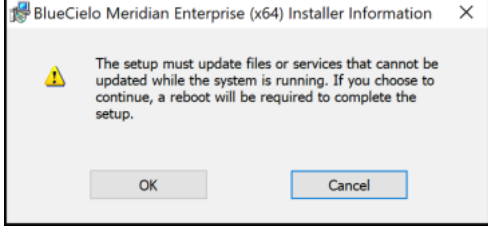
The user will have access to the Powerco web site home page. The Meridian Web Access site must be added to the Trusted sites zone, <https://meridian.powerco.co.nz>

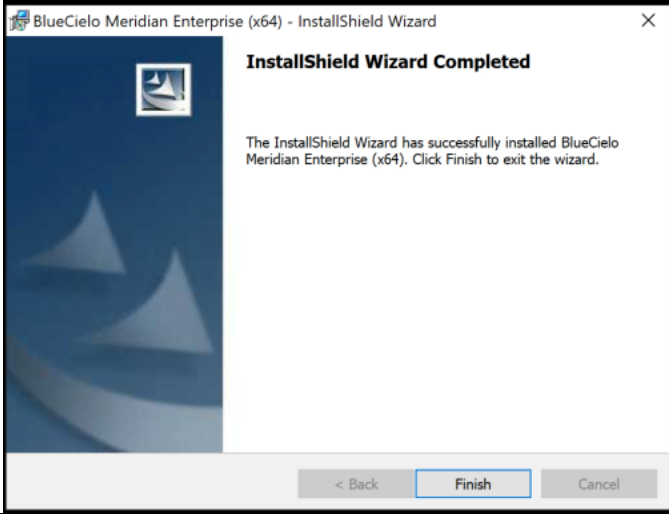
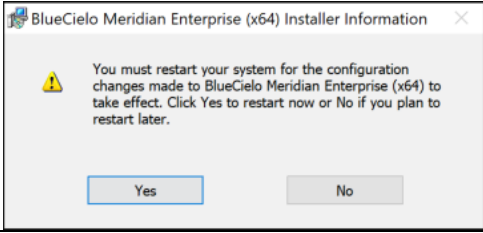
Steps

| | |
|---|--|
| <p>Step 1</p> <ul style="list-style-type: none"> Download the zip file to your local hard drive 'BlueCielo Meridian Enterprise (x64).msi' from the Powerco web site Home page Once installed you can delete everything |  |
| <p>Step 2</p> <ul style="list-style-type: none"> Run BlueCielo Meridian Enterprise (x64).msi Press Next |  |

| | |
|--|--|
| <p>Step 3</p> <ul style="list-style-type: none"> • Accept the terms • Press Next |  |
| <p>Step4</p> <ul style="list-style-type: none"> • Accept defaults or change as required • Press Next |  |
| <p>Step 5</p> <ul style="list-style-type: none"> • Select custom install • Press Next |  |

| | |
|---|--|
| <p>Step 6</p> <ul style="list-style-type: none"> • Deselect online Clients • Press Next |  |
| <p>Step 7</p> <ul style="list-style-type: none"> • Enter https://meridian.powerco.co.nz • Press Next |  |
| <p>Step 8</p> <ul style="list-style-type: none"> • Leave everything blank • Press Next |  |

| | |
|--|---|
| <p>Step 9</p> <ul style="list-style-type: none"> • Press Next |  |
| <p>Step 9</p> <ul style="list-style-type: none"> • Press Install |  |
| <p>Step 10</p> <ul style="list-style-type: none"> • If Windows asks to allow Meridian to update your system, Click yes • Press OK |  |

| | |
|---|--|
| <p>Step 11</p> <ul style="list-style-type: none"> Once the application has installed Press Finish |  |
| <p>Step 12</p> <ul style="list-style-type: none"> Press yes to restart your computer |  |
| <p>Step 13</p> <ul style="list-style-type: none"> You will now be able to open your browser and work as normal | <p>Task complete</p> |

7. Document review history

| Version number | Reviewed by. | Review date | Reason |
|----------------|--------------|-------------|--|
| 10 | M. Coombe | 25/07/2022 | Update format, taxonomy Added Quick Reference Guides (QRG) |
| 11 | M. Coombe | 23/08/2022 | Minor change as required to change document from Corporate to Public Data classification |
| 12 | M. Coombe | 05/08/2024 | Updated to align with application upgrade |
| | | | |
| | | | |
| | | | |
| | | | |