



Purpose

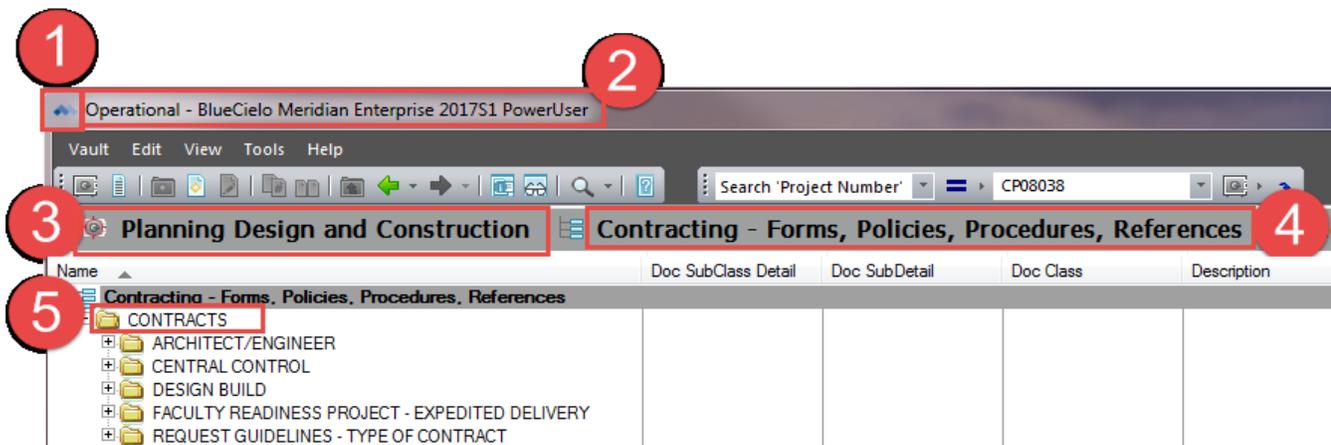
As we get the correct, master version of the contracts into Meridian, this will help you navigate to the template versions of the documents needed for creating project specific contracts.

You can either use the Meridian Desktop client if you are logged into an IPF machine or you can use the Meridian Explorer web client if you are using an external computer.

Procedure

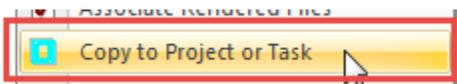
Using Meridian Desktop client:

1. Open 'Meridian'. 
2. Open the 'Operational Vault'. 
3. Make sure you are in the 'Planning, Design and Construction' scope. 
4. Open the 'Contracting – Forms, Policies, Procedures, References' nav view. 
5. Open the 'Contracts' folder and navigate to the contract you are looking for. 
6. Double click the file to open it and fill it out. Save to your computer or see optional functions below.



Optional functions:

- To save the document directly into a project in Meridian and make it project specific, right click and select 'Copy to Project or Task' function. You may need further instruction on how to manage files in Meridian this way.

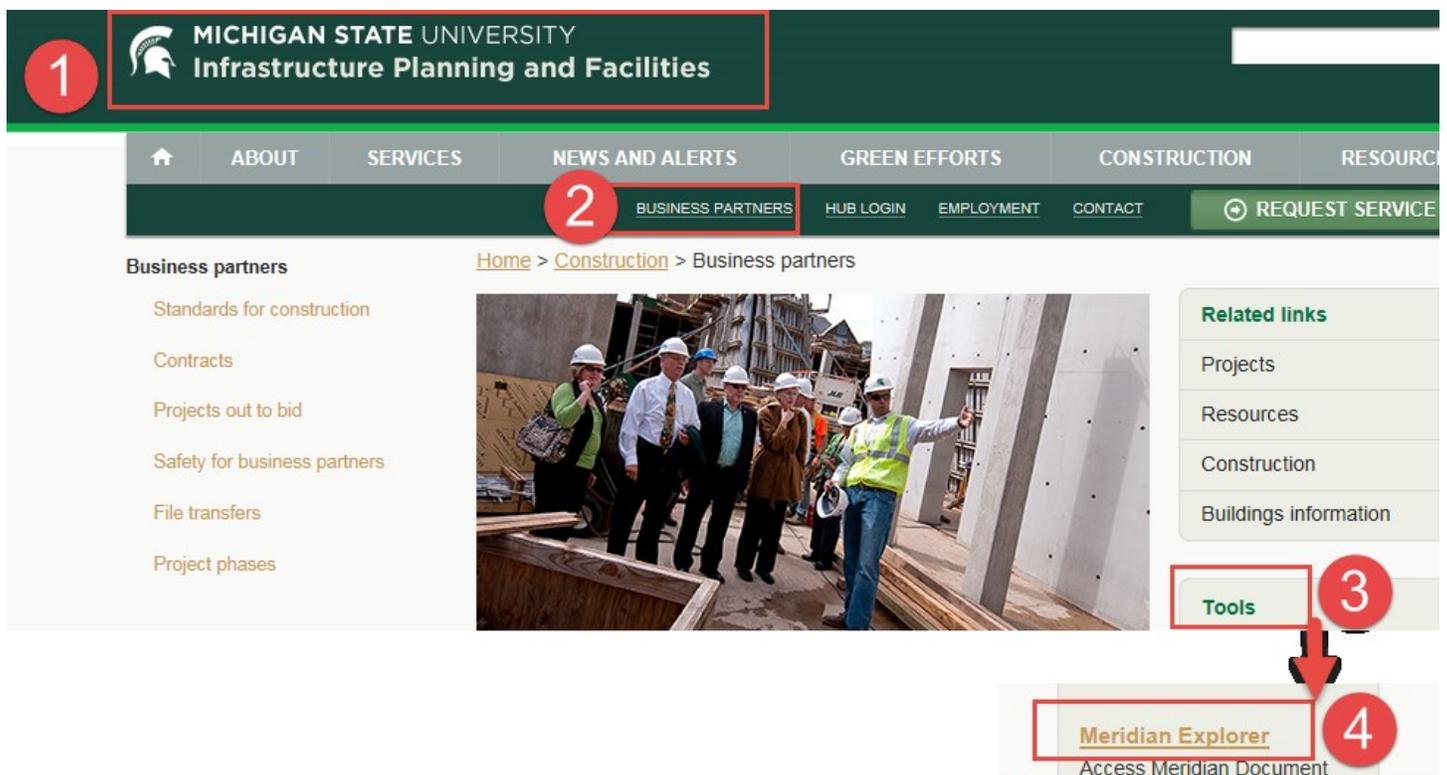


Using Meridian Explorer web client:

There are many different ways to access the Contract forms in Explorer. You can use the IPF Webpage, Facilities Information Tool or Meridian Explorer directly to get there. The following instructions are for using the IPF webpage to open Meridian Explorer and saving your search to use every time.

Accessing Meridian Explorer:

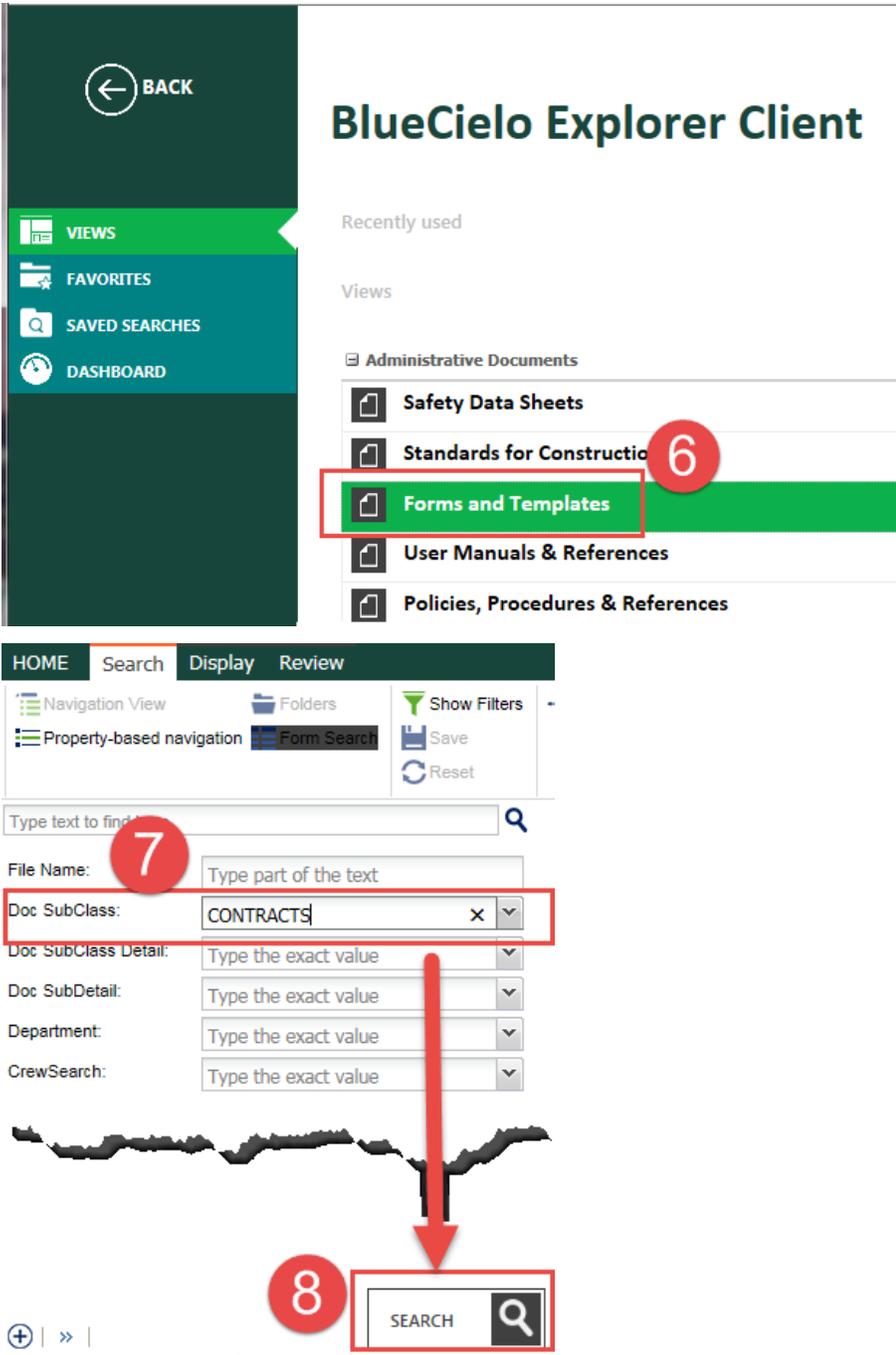
1. Open web browser (internet explorer works best for Meridian Explorer). 
2. Open the [IPF Webpage](#), '[Business Partners](#)',
3. Scroll down to the end under the 'Tools' section.
4. Click on '[Meridian Explorer](#)'. (once you are in Meridian Explorer, save the shortcut or bookmark the page)
5. You will use you IPF credentials to log in. If they [don't work](#), try typing 'pplant\' in front of your username.



The screenshot shows the Michigan State University Infrastructure Planning and Facilities website. The navigation menu includes: ABOUT, SERVICES, NEWS AND ALERTS, GREEN EFFORTS, CONSTRUCTION, and RESOURCE. The 'BUSINESS PARTNERS' link is highlighted with a red circle and the number 2. Below the navigation menu, the 'Business partners' section is visible, with a list of links: Standards for construction, Contracts, Projects out to bid, Safety for business partners, File transfers, and Project phases. A large photograph of construction workers is displayed. To the right, the 'Related links' section includes: Projects, Resources, Construction, and Buildings information. The 'Tools' link is highlighted with a red circle and the number 3. Below the 'Tools' link, the 'Meridian Explorer' link is highlighted with a red circle and the number 4, with the text 'Access Meridian Document' below it. A red arrow points from the 'Tools' link to the 'Meridian Explorer' link.

Searching in Explorer:

6. Once you are in Explorer, open the 'Forms and Templates' view.
7. Select or Type 'CONTRACTS' in the 'Doc Subclass' field.
8. Click on 'Search'

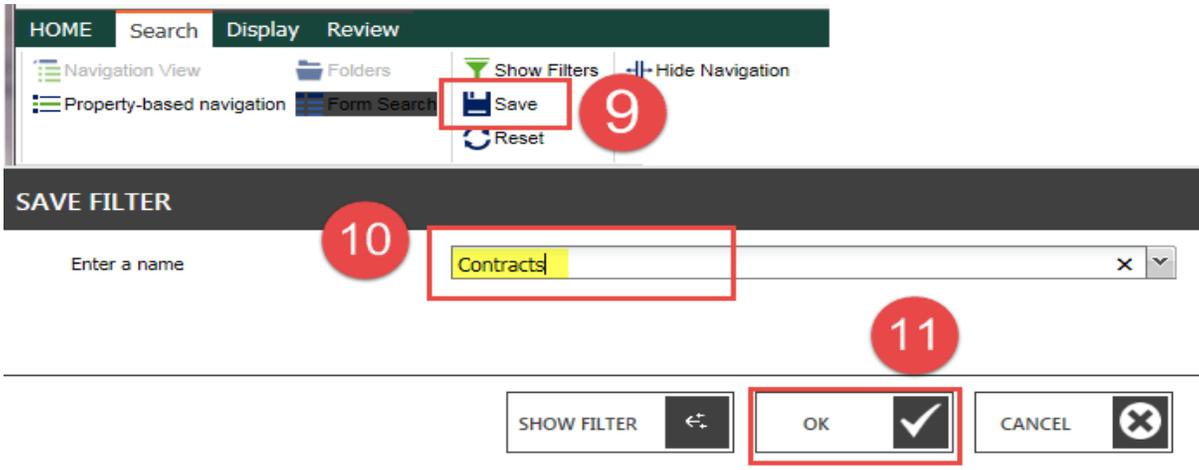


Saving your search criteria: (one time set up)

9. To save this search filter for further use, click 'Save'.

10. Name your saved search.

11. Click 'OK'.



Accessing your Saved Search:

12. Click on 'HOME' (after one time set-up).

13. From Home page, click on 'SAVED SEARCHES'.

14. Select your saved search from the list.

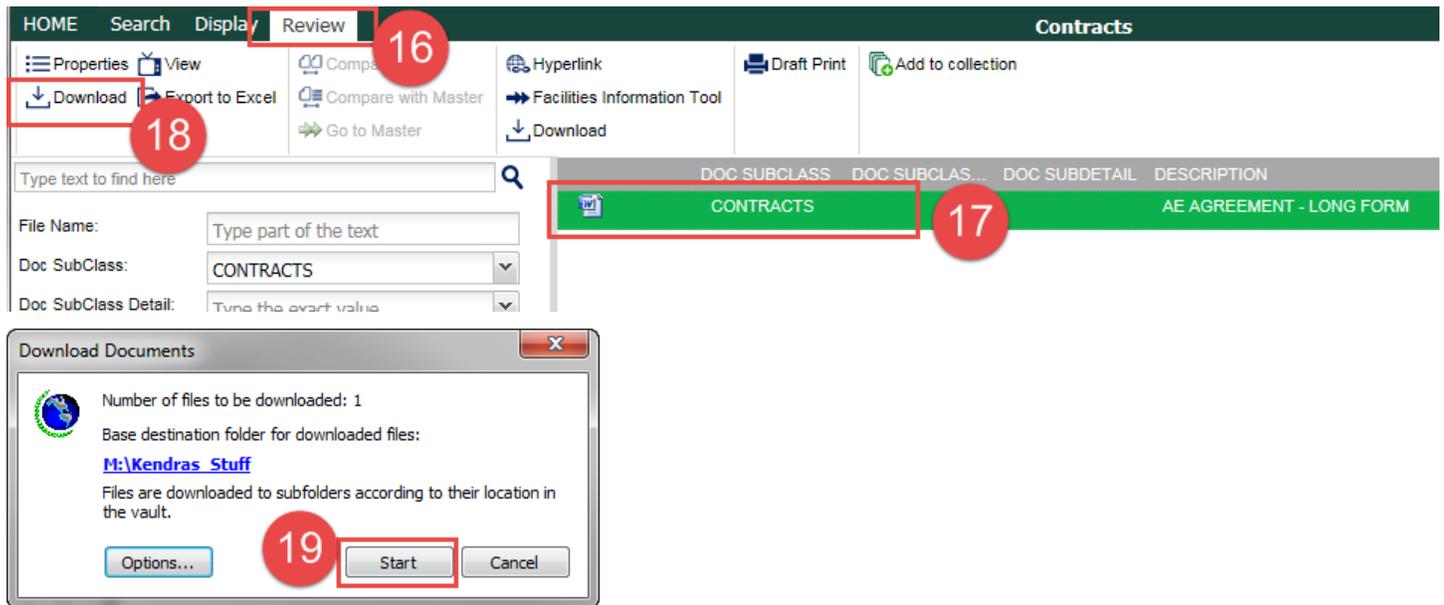
15. This will take you to your pre-filtered search criteria, make sure to hit 'Search' to filter the list.



Opening the file from Meridian Explorer:

16. Click on 'Review'.
17. Select the file.
18. Click 'Download'
19. Click 'Start' (every time after the **File Save Location** one time set up below).

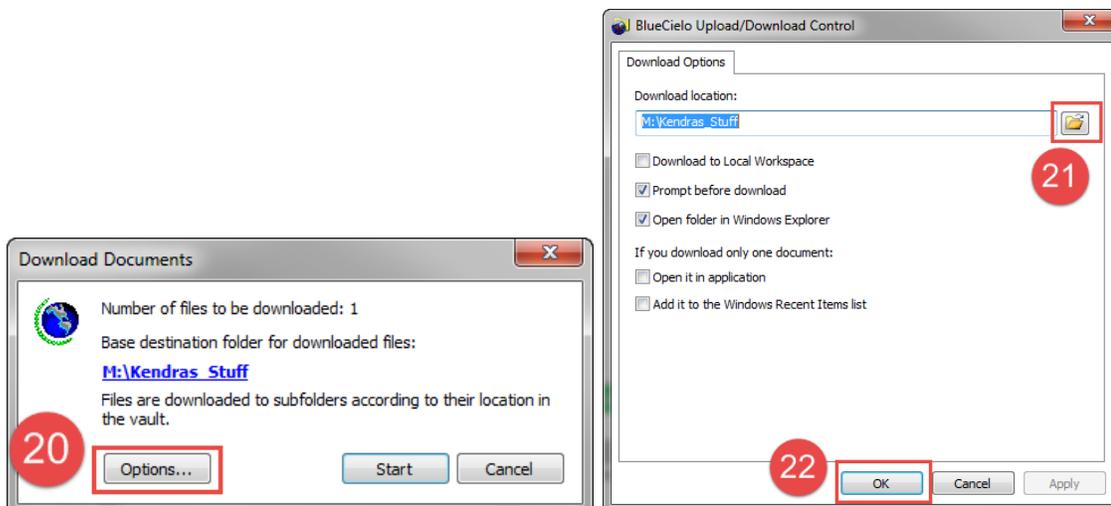
Then business as usual to work on your file.



File Save Location: (One time set-up)

Depending on your computer preferences, you may be asked to browse to a spot on your computer to save the file, or to open or save the file.

20. If you need to, click 'Options'.
21. Browse to a location and set your preferences for future downloads.
22. Click 'Apply' and 'OK'.



Revision History and Owner of Document

Created: March 2018

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