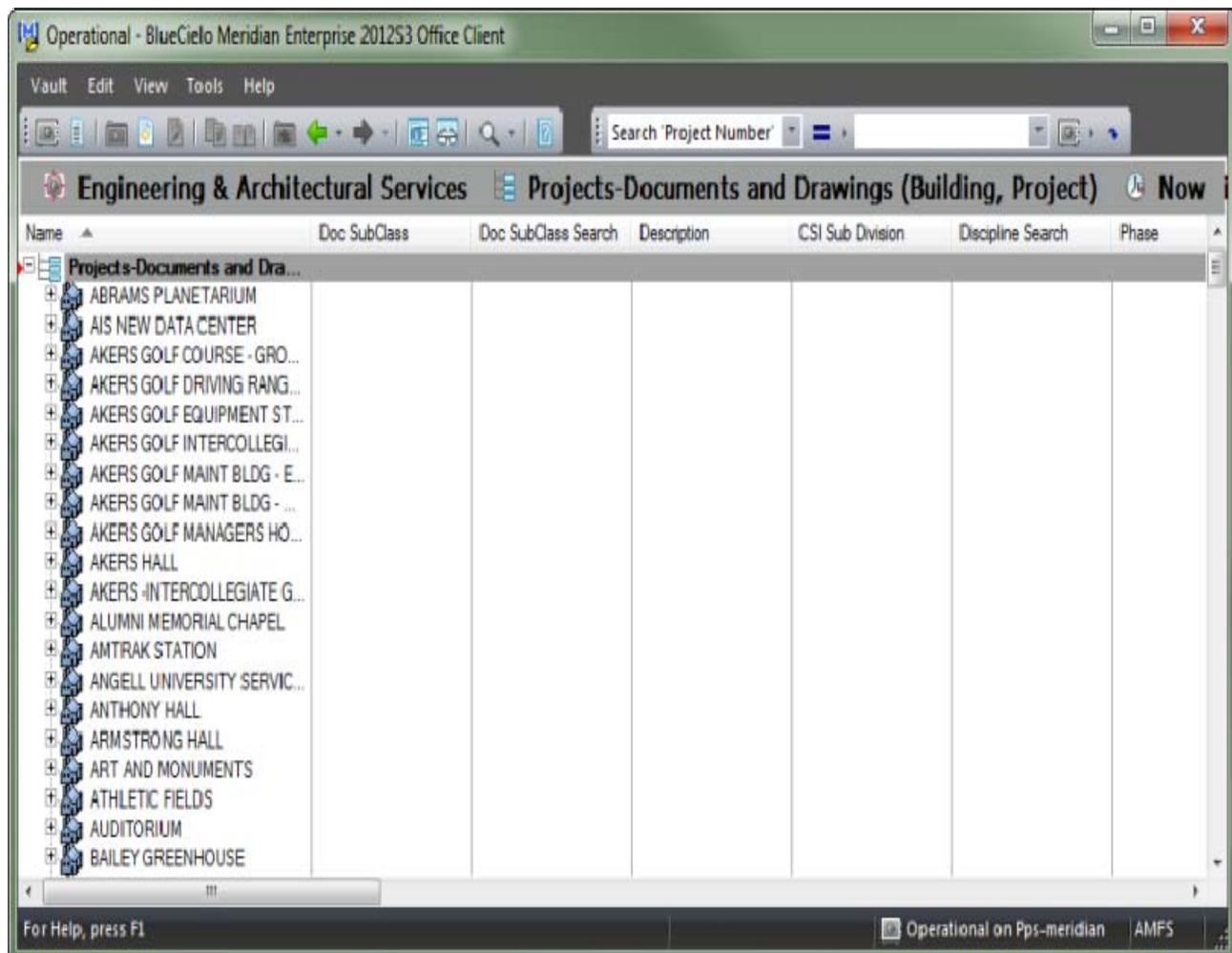


## MERIDIAN DOCUMENT MANAGEMENT SYSTEM

# Projects (Documents & Drawings)



This manual will provide step-by-step instructions on adding, creating, modifying, searching and viewing project related documents and drawings in the Operational Vault.



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# 1 Projects Training Overview

This training manual contains all of the following explanations and instructions:

1. What the 'Projects' document types are
2. Where the 'Projects' documents and drawings are located
3. Why we are using 'Projects'
4. How to use 'Projects'
  - a. Searching for documents/drawings
  - b. Adding documents/drawings
  - c. Using other document types from Meridian
  - d. Modifying document and drawings
  - e. Editing Properties
  - f. Deleting documents and drawings
  - g. Referencing documents and drawings



---

## 2 Projects Explanation

### 2.1 What it is!

**Projects** is an area in the Meridian Operational Vault. **Projects - Documents** and **Projects - Drawings** are Document Types within **Projects**. Meridian will be the central repository for the documents and drawings you all **work on** during a project. If used correctly, any IPF staff member should be able to find the documents and drawings that are being worked on at any time during the life of the project.

### 2.2 Where is it?

**Projects - Documents** and **Projects - Drawings** are located in the Operational Vault in Meridian.

### 2.3 Why are we using it?

We are using Projects in Meridian to make our jobs easier. If everyone files their project documents and drawings in the correct places during the life of a project, we will be a more organized and productive office.

### 2.4 How to use it

This manual will give you all the information needed to be able to use Projects efficiently and effectively so that all of IPF will benefit from it.

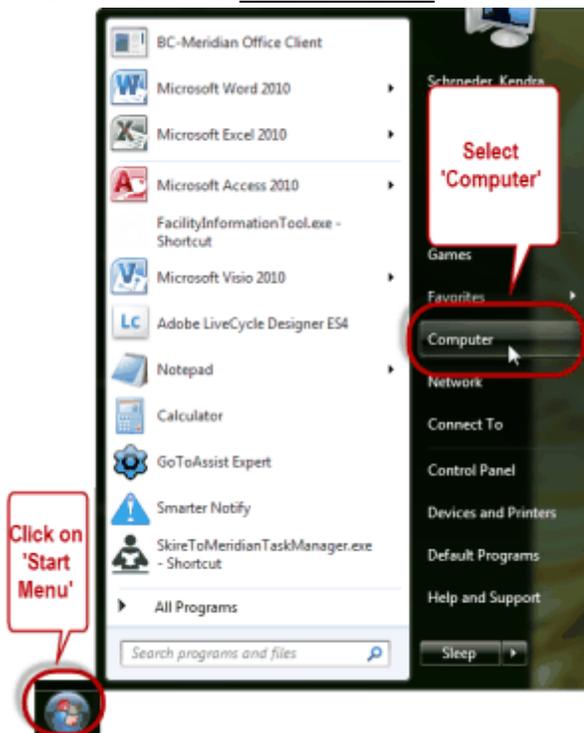
### 3 General

#### 3.1 Power User

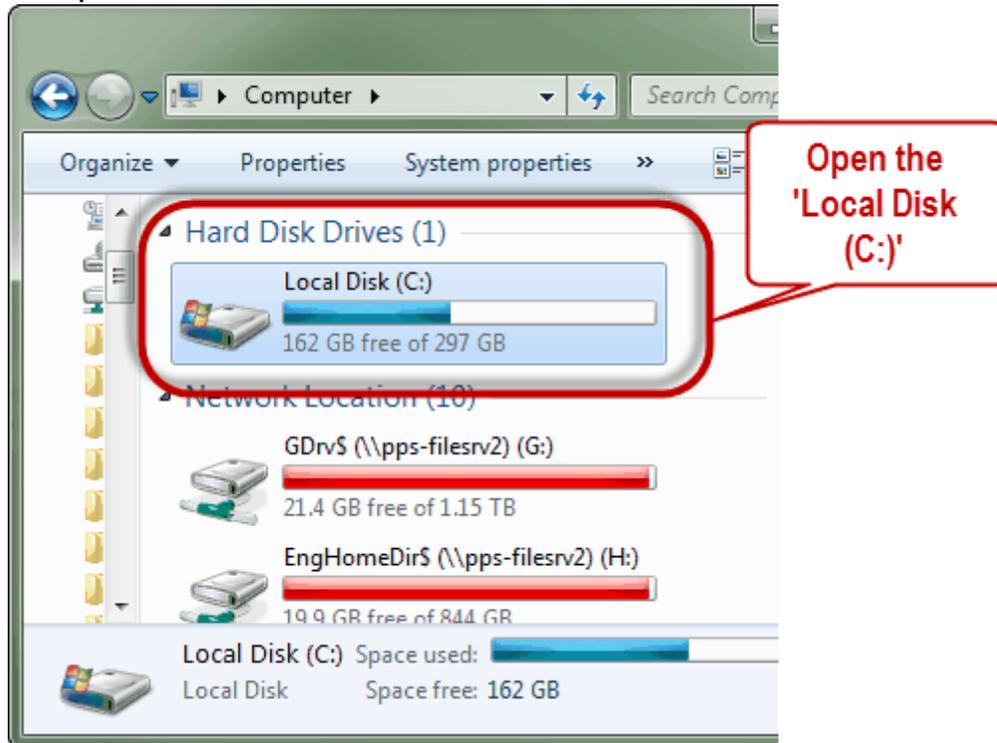
If you are going to do any work with CAD drawings, you must be using the Meridian **Power User**. The following are instructions to get the Power User icon on your desktop. This is the only way to get the Power User shortcut, it is **NOT** available in your Start Menu Programs.

#### C:\Program Files (x86)\BC-Meridian\Program

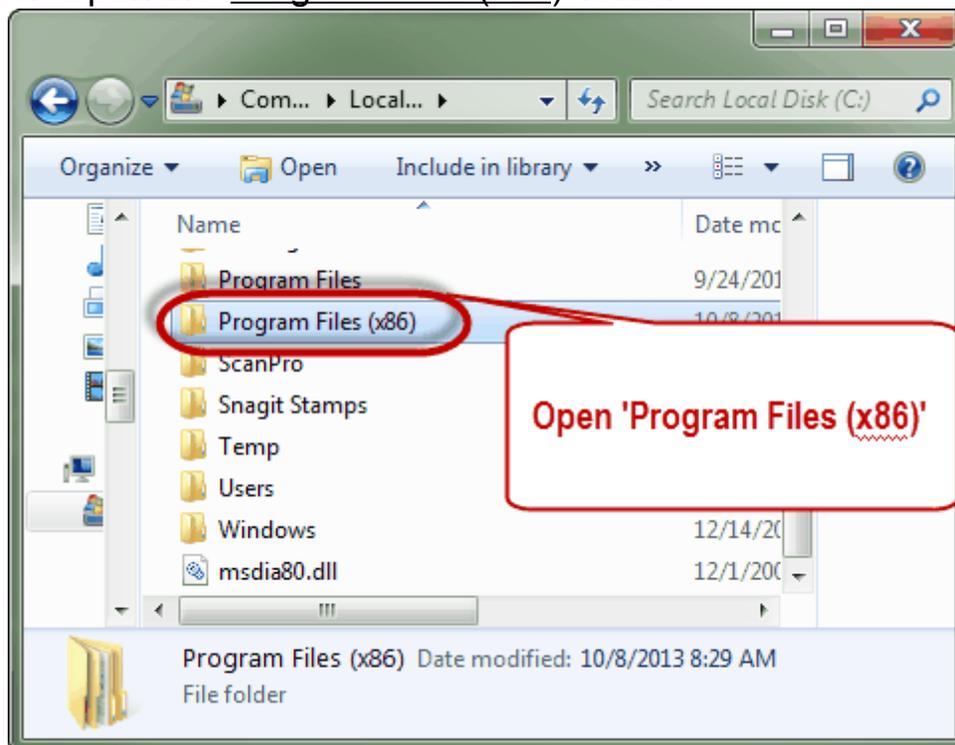
1. Click on the 'Start Menu' and select 'Computer':



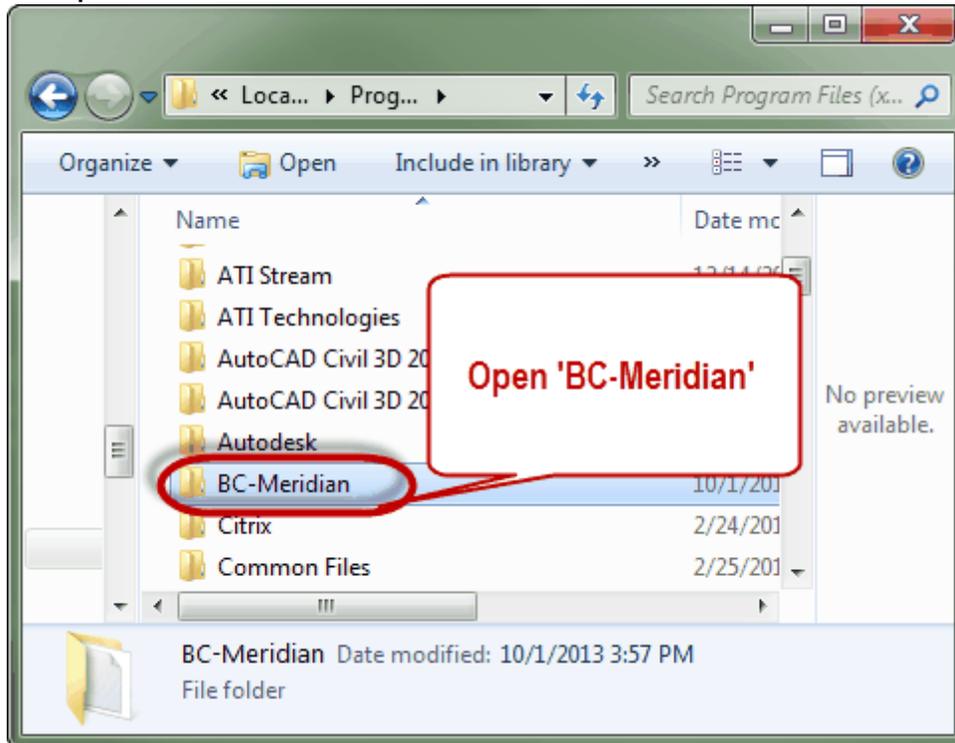
## 2. Open the C: drive



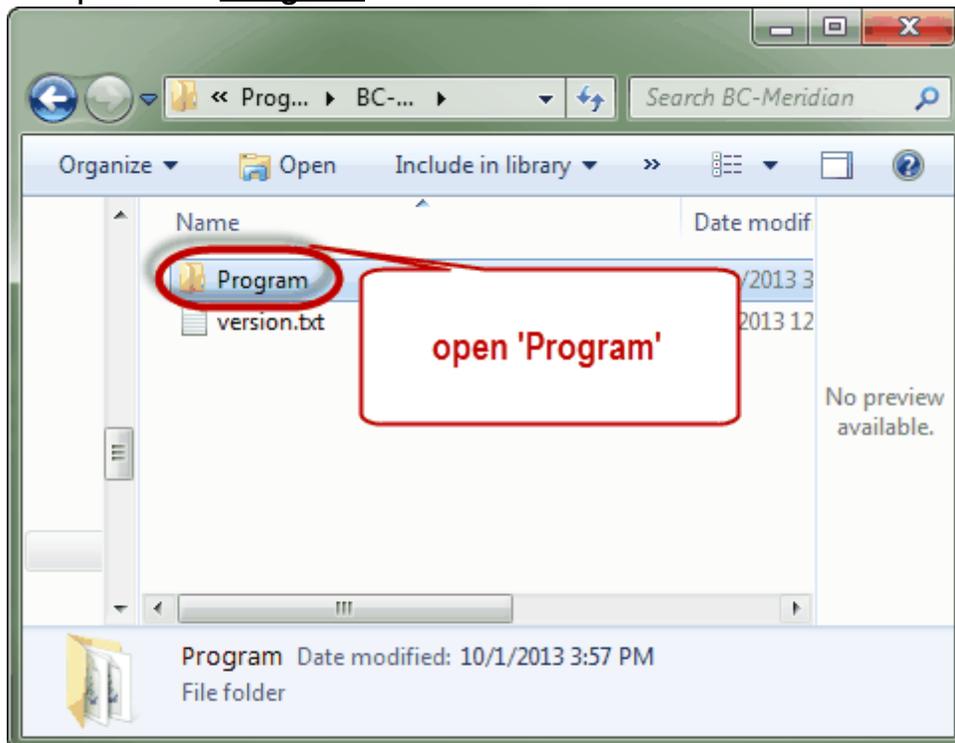
## 3. Open the 'Program Files (x86)' folder



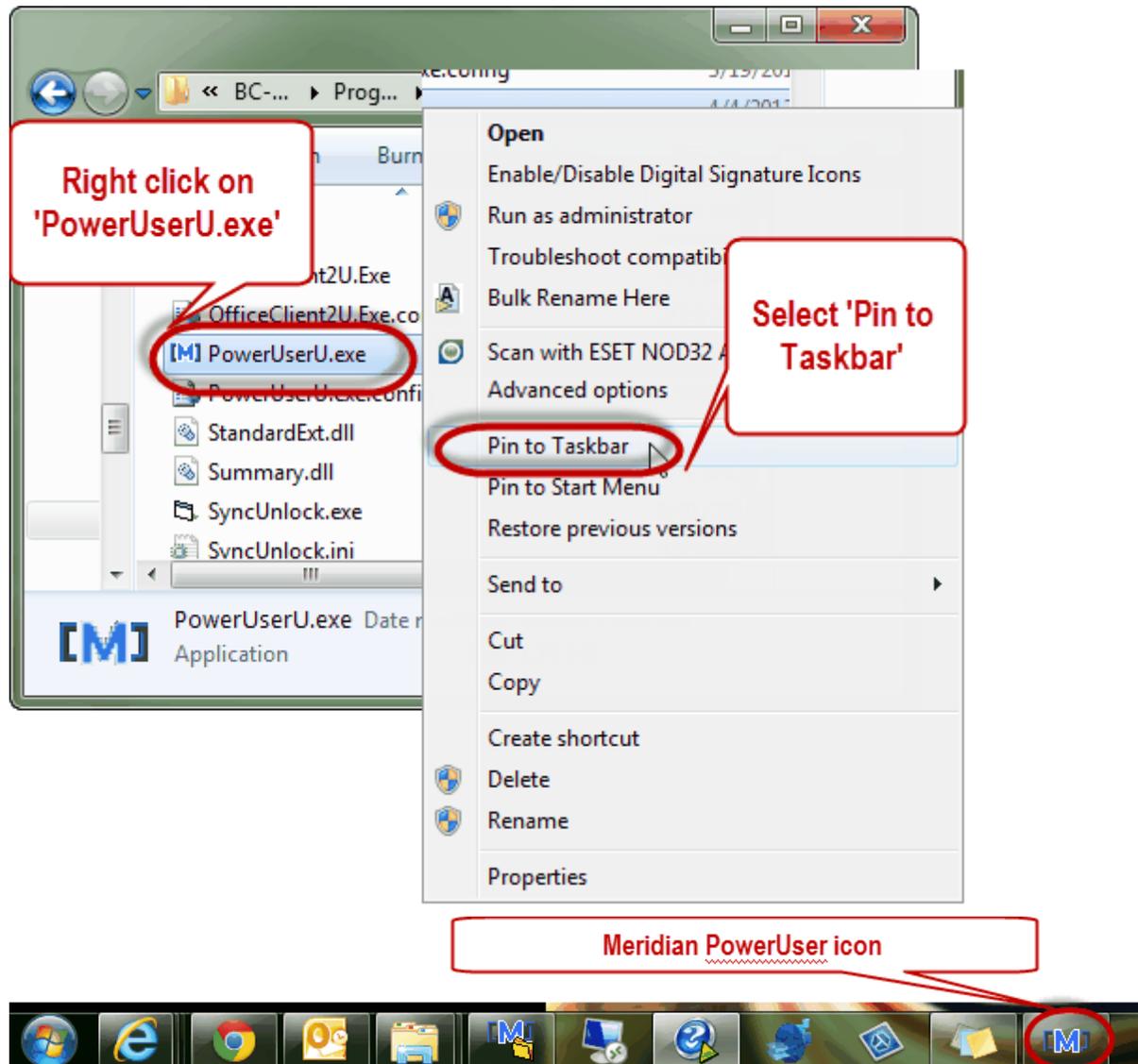
#### 4. Open the BC-Meridian folder



#### 5. Open the 'Program' folder



## 6. Create the shortcut



### 3.1.1 Exercise 1

## Power User Shortcut

Please create the shortcut for the Power User on your computer.

## 3.2 Location, Location, Location

**It is extremely important to make sure you are always working in the correct location within Meridian.**

The different vaults and document types are set up for specific reasons and your permissions vary depending on where you are and what you are trying to do.

### 3.2.1 Operational Vault

To access Projects, you have to be in the **Operational** Vault in Meridian.

1. Open 'Meridian' (Power User if working with CAD drawings):

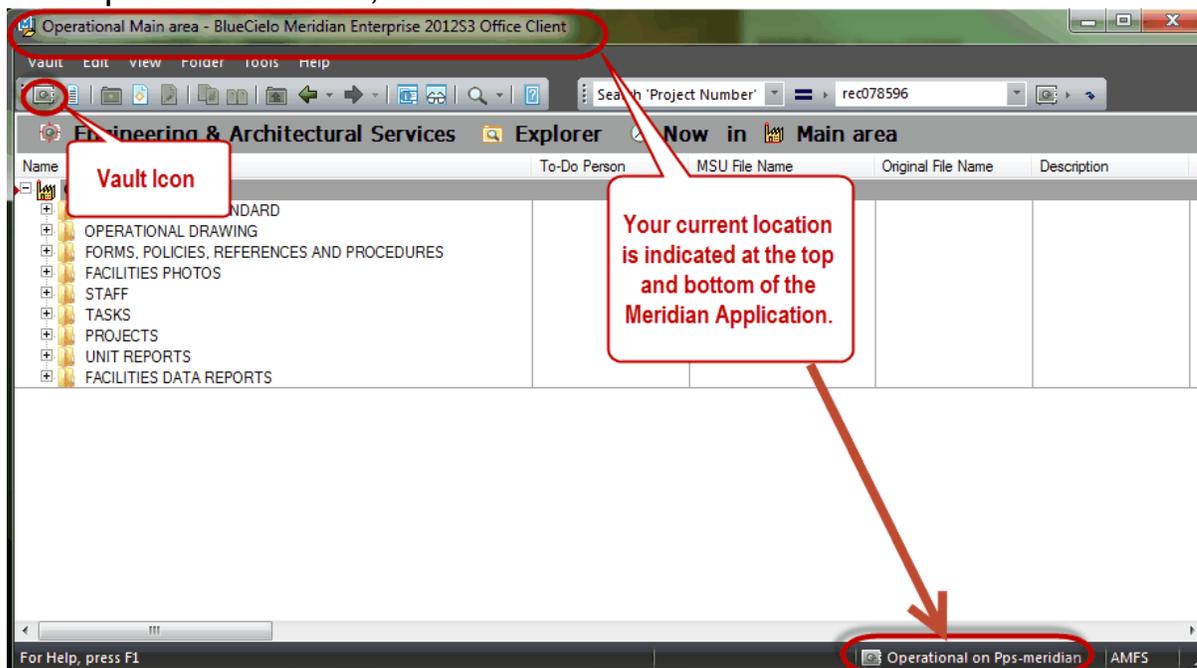


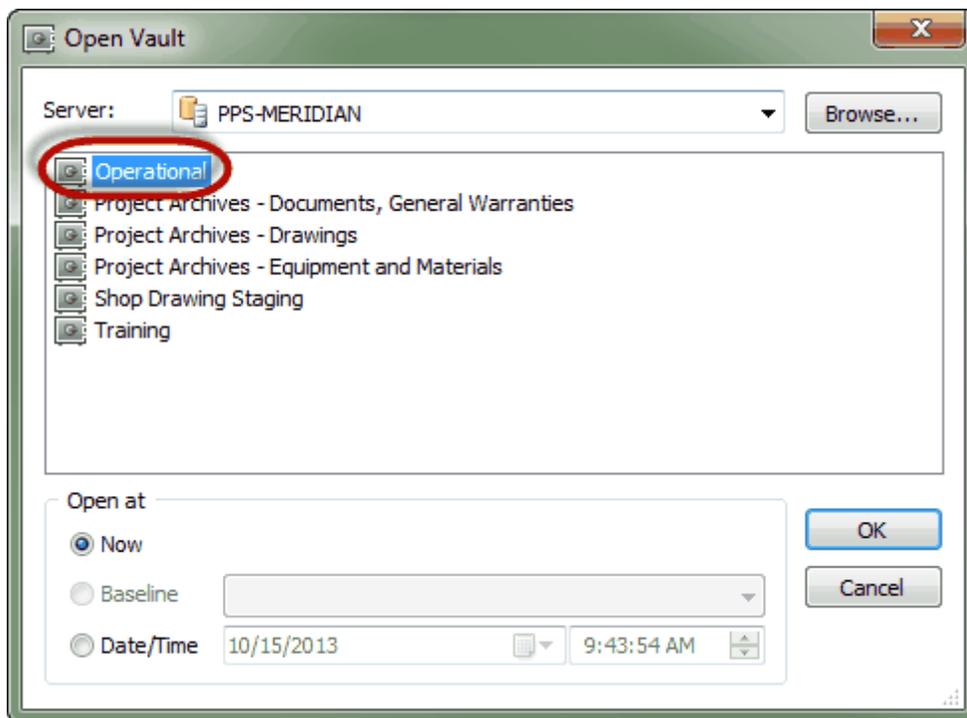
Power User Icon



Office Client Icon

2. Make sure you are in the 'Operational Vault'. If you are not working in the 'Operational Vault', use the vault icon to select it.



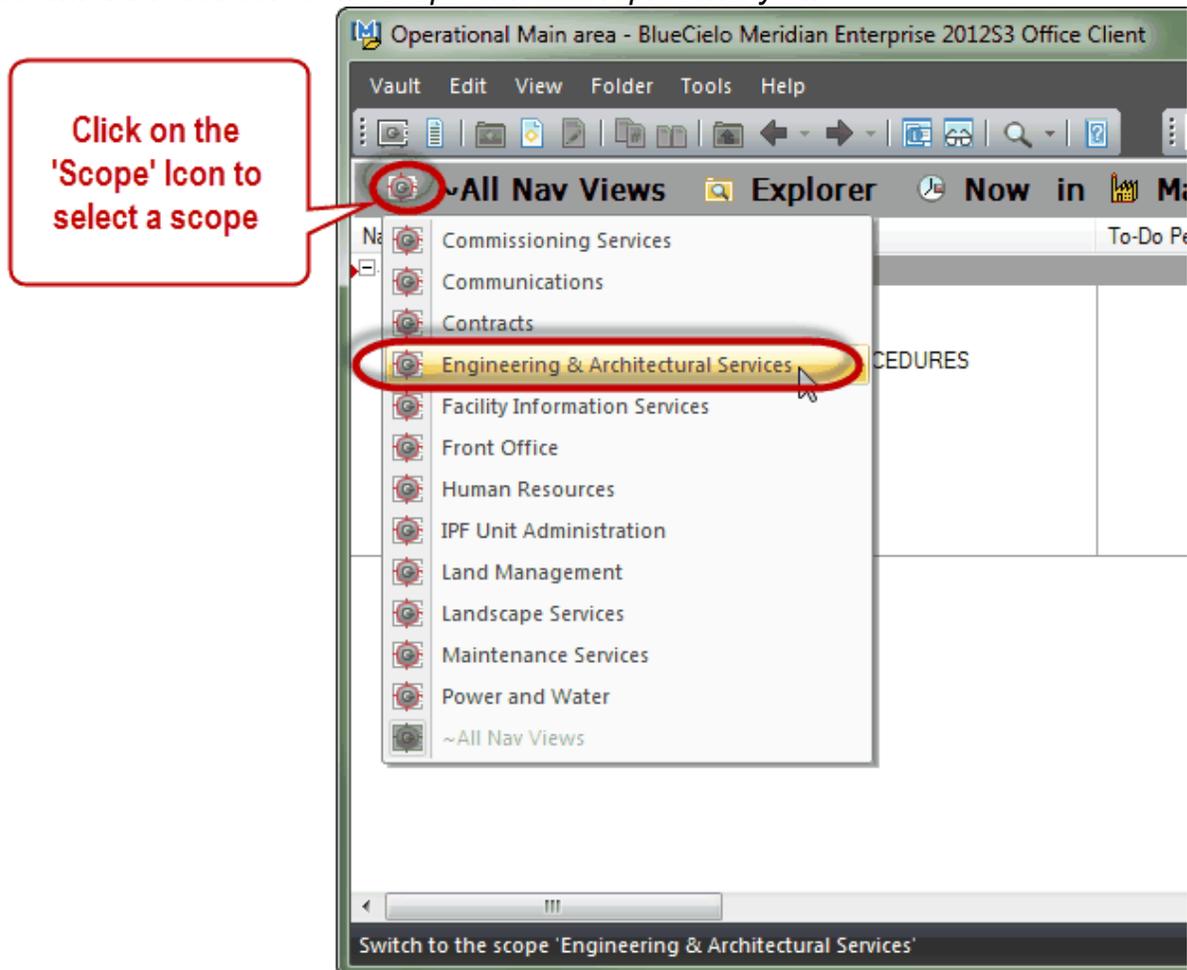


### 3.2.2 Scopes

The Scope is a pre-determined focus for the department or crew you work in. Scopes are only used in the Operational Vault at this time.

Each scope should contain all the Document Types you will need to access and work with in the Operational Vault.

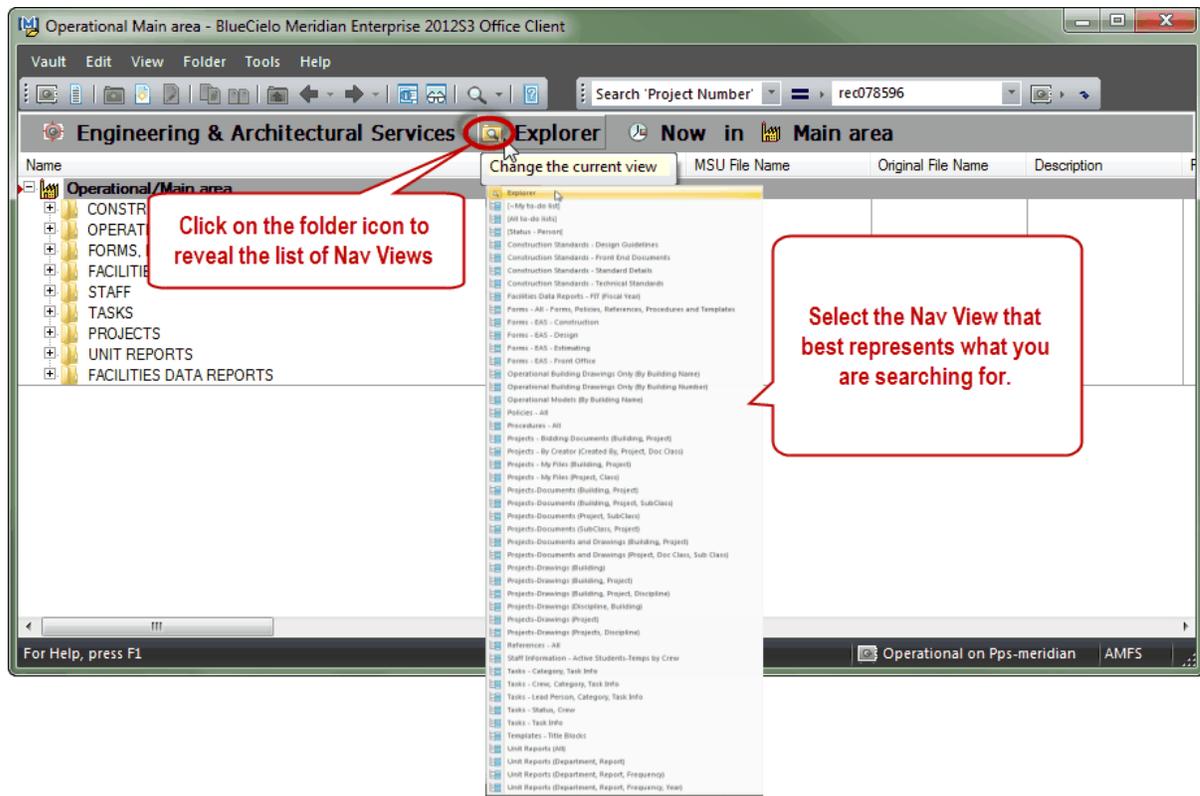
*\*\*\*You will be prompted to select a Scope upon entering the Operational Vault for the first time. Please select the scope that best represents you.\*\*\**



### 3.2.3 Nav Views

Navigational (Nav) Views are pre-determined **searches** based on the indexing properties of the files in Meridian.

Nav Views are one of the tools used to search for files stored in Meridian.



## **The Anatomy of a Nav View:**

By Design, the Nav Views describe what will be displayed and in what order the folders will appear.

Examples:

1. If you are searching for all the working Documents and Drawings for a specific Project and you want them displayed in a folder structure by Project Information and then Document Type, you would choose:

 Engineering & Architectural Services  Projects-Documents and Drawings (Project, Doc Class, Sub Class)

2. If you are searching for Technical Construction Standards in order to use them to create a project specification, you would choose:

 Engineering & Architectural Services  Construction Standards - Technical Standards

3. If you are a Designer and you need the Project Request form to fill it out for a project you are working on, you would choose:

 Engineering & Architectural Services  Forms - EAS - Design

4. If you are searching for the most current EAS Weekly Report (Capital Project Report), you would choose:

 Engineering & Architectural Services  Unit Reports (Department, Report, Frequency, Year)

Below are descriptions of the Nav Views currently available in the EAS Scope:

The image shows a navigation menu with the following items and callout descriptions:

- Files you are working on or All files being worked on** (Green callout) points to:
  - [~My to-do list]
  - [All to-do lists]
  - [Status - Person]
- MSU Construction Standards based on section or division** (Orange callout) points to:
  - Construction Standards - All
  - Construction Standards - Design Guidelines
  - Construction Standards - Front End Documents
  - Construction Standards - Standard Details
  - Construction Standards - Technical Standards
- Static Fiscal year end reports displayed in FIT** (Blue callout) points to:
  - Facilities Data Reports - FIT (Fiscal Year)
- Access to ALL Forms and Templates for every department or crew or view by specific department or crew.** (Purple callout) points to:
  - Forms and Templates - All
  - Forms and Templates - EAS
  - Forms and Templates - EAS - Construction
  - Forms and Templates - EAS - Design
  - Forms and Templates - EAS - Estimating
  - Forms and Templates - EAS - Front Office
  - Forms and Templates - Title Blocks
- Small Scale floor plans and models.** (Yellow callout) points to:
  - Operational Building Drawings Only (By Building Name)
  - Operational Building Drawings Only (By Building Number)
  - Operational Models (By Building Name)
- Policies, Procedures or References used by IPF** (Red callout) points to:
  - Policies, Procedures and References - All
  - Policies, Procedures and References - User Manuals
- Projects Area: Documents and/or Drawings are displayed by the order in the parantheses. The Nav View 'By Creator' will display all the files YOU have added to Meridian. The Nav View 'My Files' shows you any document you are currently working on.** (Green callout) points to:
  - Projects - By Creator (Created By, Project, Doc Class)
  - Projects - My Files (Building, Project)
  - Projects - My Files (Project, Class)
  - Projects-Documents (Building, Project)
  - Projects-Documents (Building, Project, SubClass)
  - Projects-Documents (Project, SubClass)
  - Projects-Documents (SubClass, Project)
  - Projects-Documents and Drawings (Building, Project)
  - Projects-Documents and Drawings (Project, Doc Class, Sub Class)
  - Projects-Drawings (Building)
  - Projects-Drawings (Building, Project)
  - Projects-Drawings (Building, Project, Discipline)
  - Projects-Drawings (Discipline, Building)
  - Projects-Drawings (Project)
  - Projects-Drawings (Projects, Discipline)
- Student Employee photos** (Orange callout) points to:
  - Staff Information - Active Students-Temps by Crew
- Tasks are non-CP related efforts stored in Meridian.** (Blue callout) points to:
  - Tasks - Category, Task Info
  - Tasks - Crew, Category, Task Info
  - Tasks - Lead Person, Category, Task Info
  - Tasks - Status, Crew
  - Tasks - Task Info
- Unit wide and departmental reports** (Purple callout) points to:
  - Unit Reports (All)
  - Unit Reports (Department, Report)
  - Unit Reports (Department, Report, Frequency)
  - Unit Reports (Department, Report, Frequency, Year)

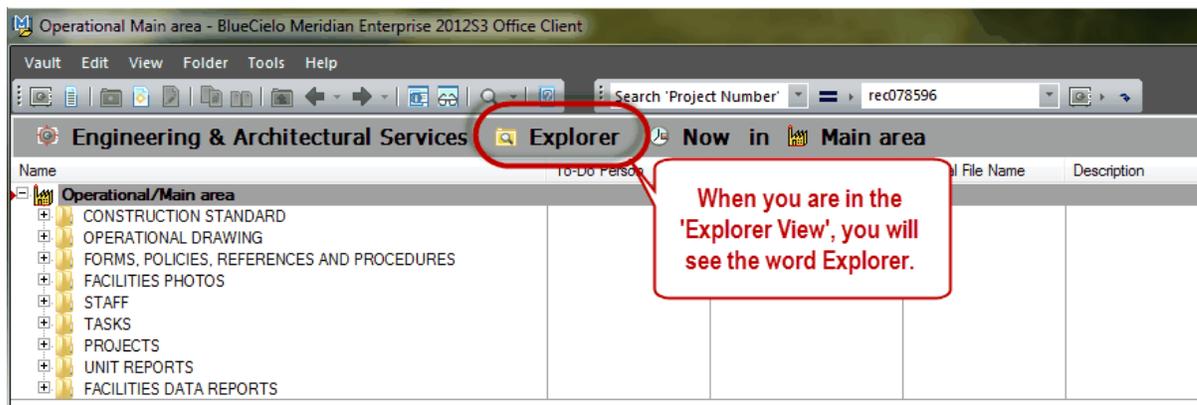
### 3.2.4 Explorer View

The Explorer View is for **Adding** files to Meridian. **You will want to continue using Nav Views when searching in order to find files with greater ease.**

- In the past we have asked that you navigate away from this view. Now that you will be adding files, you can use this view for that purpose.
- There is **NO NEED** to search for the project first, you can simply drag and drop a file in the Explorer view. Meridian will file it in the correct location based on how you describe the file.

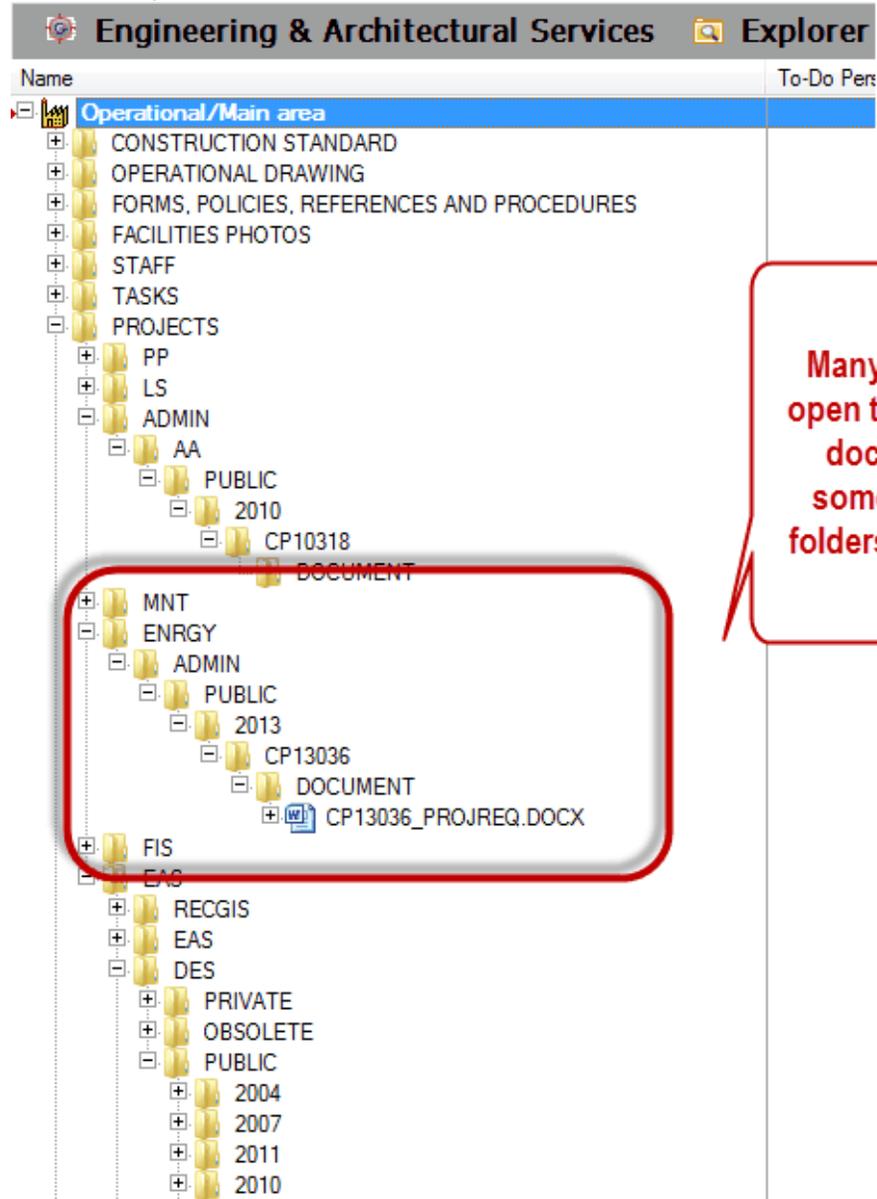
*Remember:*

- *Explorer is organized by user permissions and security groups. You will NOT see all the files you want grouped together.*
- *Nav views are organized by document type and by design display the files in folder structures that make sense.*



Notice the difference between the two types of Views:

Explorer View - ALL files in Vault and extremely difficult to navigate to the files you need.



Navigational View - Easier to navigate to files you are looking for and more results.

**Engineering & Architectural Services** **Projects-Documents (Project, SubClass)**

Name	Doc SubClass Search	Description	CSI Sub-division	Discipline Search
CP13035 - ENGINEERING - A...				
CP13036 - PARKING - LIFE SCI...				
BUDGET				
DESIGN NOTES				
DESIGN STATUS MEMOR...				
PROJECT REQUEST				
CP13036_PROJREQ.DO...				
CP13036_PROJREQ.docx				
CP13037 - T.B. SIMON FOWE...				
CP13038 - SPARTAN CHILD D...				
CP13039 - T.B.SIMON POWER...				
CP13040 - COMMEMORATIVE ...				
CP13042 - FOOD SCIENCE - A...				
CP13042 - FOOD SCIENCE - IN...				
CP13044 - BRYAN HALL - INS...				
CP13045 - BIOMEDICAL PHYS...				
CP13046 - MICHIGAN STATE ...				
CP13047 - COMPUTER CENT...				
CP13048 - VETERINARY MEDI...				
CP13049 - PATHWAYS - LOT ...				
CP13050 - PUBLIC SAFETY - A...				
CP13051 - ENGINEERING DE...				

By using the NAV views, I get ALL the project documents related to the project I am searching for.

## 3.2.4.1 Exercise 2

## Location & Searching

- Use the Explorer view to find the **Design Status Memorandum** for **CP13021**.
- Use the Nav Views to find the **Design Status Memorandum** for **CP13021**.

(notice the difference searching in the Nav Views versus the Explorer View)

\*you will have 7 minutes\*

## 4 Project Documents

### Overview:

- Project Documents in the Meridian Operational Vault will house all the documents being worked on, mostly in their native formats (.dwg, .doc, .xls).
- Meridian Projects is NOT the final resting place for these Documents. The final versions will either be attached to a Unifier Business Process, placed in the Unifier Document Manager or added to Meridian Project Archives.
- Autocad drawings will stay in the Projects area. They will not be moved into Archives. The final PDF files and TIF files will be archived by an FIS staff member after they are approved/distributed/made into as-builts.
- The Capital Projects Procedures webpage will tell you about each document, where it should go and who is responsible for putting it there. <http://staff.eas.msu.edu/index.cfm/capital-project-procedures/>

### Permissions:

- All EAS staff members have the permissions to add, edit properties, modify the documents and delete the documents in Projects. Meridian has a very powerful version history. It keeps track of who added or made any changes to a document, when they did it, what they changed and also allows you to access all previous versions of that document.

### 4.1 Adding Documents

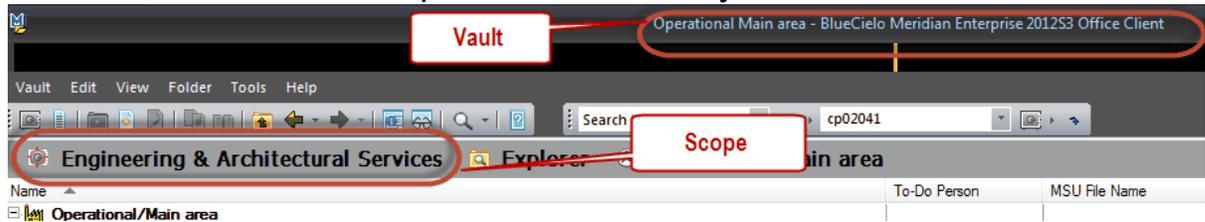
There are a few different choices for adding documents to Projects.

1. Drag & Drop a document from outside of Meridian into Projects
2. Copy a Form/Template into a Project - all within Meridian.
3. Copy a Construction Standard into a Project - all within Meridian.

### 4.1.1 Drag & Drop

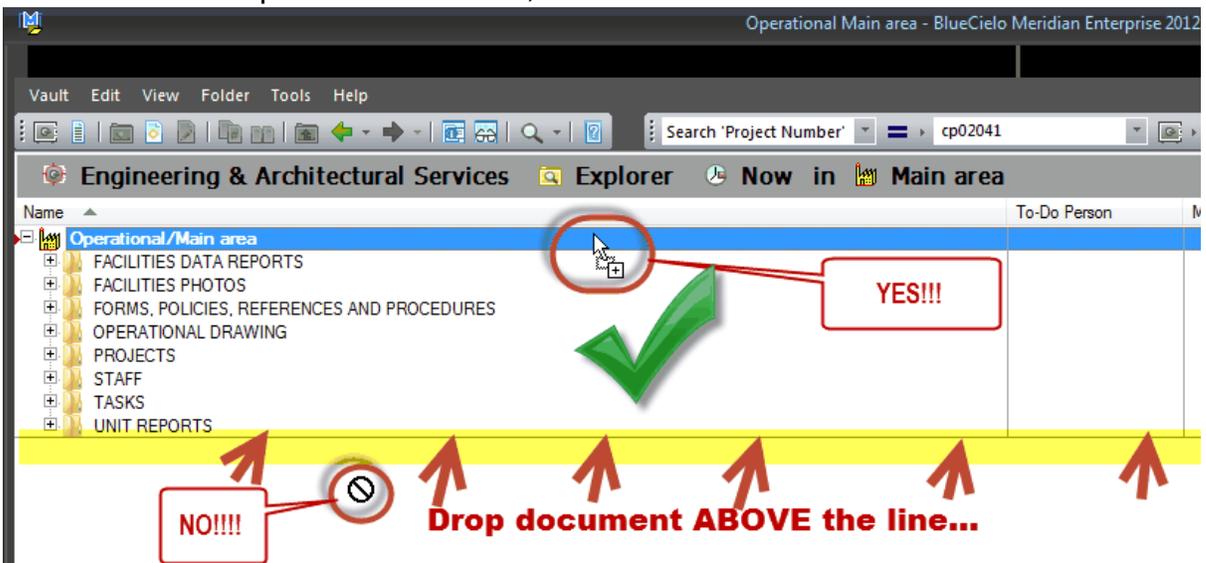
To add a document that was created outside of Meridian into the system, select the file and drag and drop it into Meridian.

To Begin, make sure you are in the Operational Vault and Scope that best describes which Department or Crew you work for.

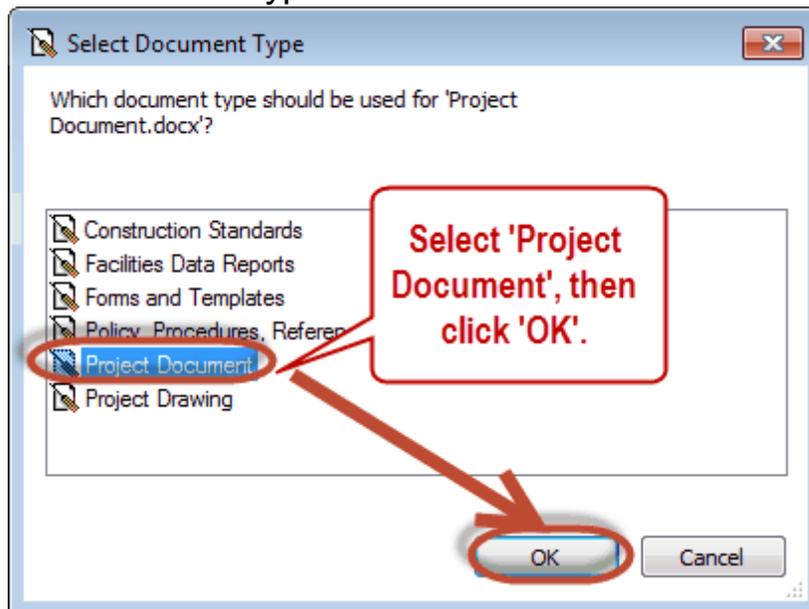


Find the document you are going to add and drag it into Meridian. You do NOT need to conduct a search first.

- Meridian will file the document based on the indexing properties you fill in, so the location you drop it in doesn't matter other than making sure you are in the Operational Vault.
- Make sure to drop it ABOVE the line, where the folder structure shows.



### 3. Document Type Selection



Now you are ready to Describe the Document you are adding to Meridian.

#### 4.1.1.1 Describe the Document



The **Wizard** is the dialog box that comes up when you are adding a document or editing document properties.

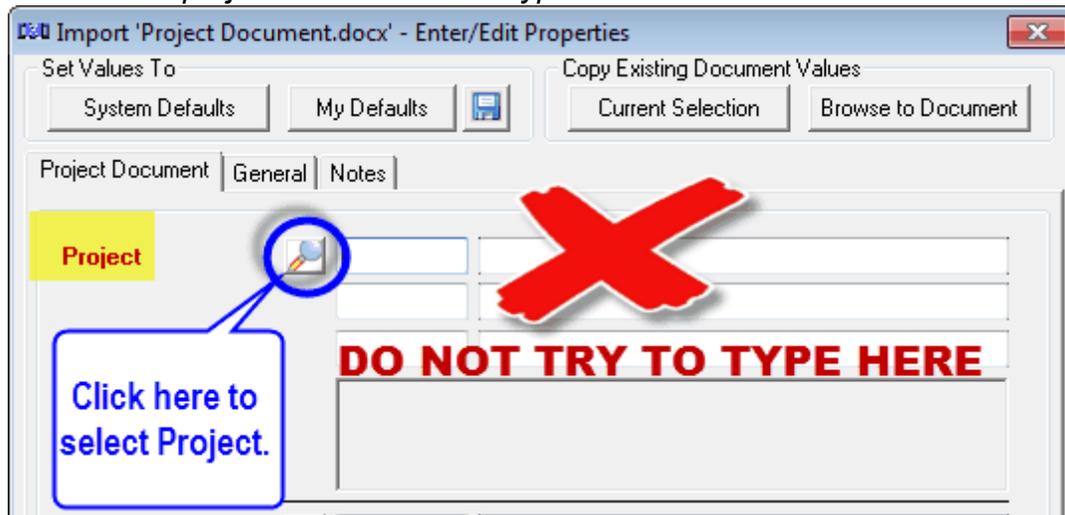
It contains the indexing fields you will use to describe the documents you are adding to Meridian. The system will then file the document appropriately and everyone working on Capital Projects will be able to find that document if they need to.

- Red fields are required
- Black are optional
- There are 3 tabs where information can be filled out
-  magnifying glass icons give you access to drop-down lists for choosing pre-determined values
-  View button allows you to open and view the document you are adding in order to describe it correctly.

## 4.1.1.1.1 Project Document Tab

**The first thing you will need to do is pick the Project this document should be filed under.**

- **Click on the magnifying glass next to project.** *\*There is NO other way to select a project. You CANNOT type in this field.*



### **Project Selection:**

Type in blank fields to search and hit enter or the binoculars icon. Any combination of fields is acceptable.

- **Rec Id** - The Record ID used by Records as a unique project identifier
- **Source** - Legacy, Capital Project or Project Request
- **Proj. No.** - Project Number- Capital Project (CP#####), card numbers (###), Project Request (PR#####), No Project Number (REC#####)
- **Description** - any part of a project name (ex. Fire, Exterior, Alterations to Room)
- **Start Year** - Year the project was created in FAMIS or for Legacy projects - year of the project based on documents found in Records.
- **Related Projects** - when projects are combined, we relate them
- **Building(s)** - all the building numbers of the buildings involved in the project
- **Building Name** - the Name of the Primary Building for the Project
- **Status** - a Records tool for monitoring the projects. Pending (projects created in FO and not yet checked by Records), Active - Good to use, Inactive - combined with another project that is active. This is NOT the FAMIS status.

# Project Selection Tool

The image shows two screenshots of the 'Select Project' dialog box. The top screenshot shows the search criteria fields with callouts: 'Filter on 'Capital', 'Legacy' or 'Project Request' (yellow), 'type the project number here' (red), 'type any part of the project name here' (orange), 'type a building number here' (green), 'Type a Building name here' (blue), 'Binocular Icon conducts search' (purple), and 'Refresh icon clears search' (cyan). The bottom screenshot shows a table with one row selected, with a callout 'Select the project, then click OK' pointing to the 'OK' button.

Rec ID	Source	Proj. No.	Description	Start Year	Related ...	Building(s)	Building Name	Status
1	LEGACY	REC0000...	TEST - TEST - TEST - TEST - TEST - TESTING - ...	2008		0001	PAOLUCCI BUILDING	ACTIVE

Import 'Project Document.docx' - Enter/Edit Properties

Set Values To: System Defaults My Defaults 

Copy Existing Document Values: Current Selection Browse to Document

Project Document | General | Notes

**Project**

	1	LEGACY
	REC000001	TEST - TEST - TEST - TEST - TEST - TESTING - TES
	2008	

**Buildings**

<input checked="" type="checkbox"/>	0001	PAOLUCCI BUILDING
-------------------------------------	------	-------------------

**Department**

	EAS	ENGINEERING AND ARCHITECTURAL SERVICES
---	-----	--

**Crew**

	FISARCH	RECORDS - ARCHIVES
---	---------	--------------------

Now the Project information is filled out and also Meridian should have auto-populated the department and crew fields based on your user information.

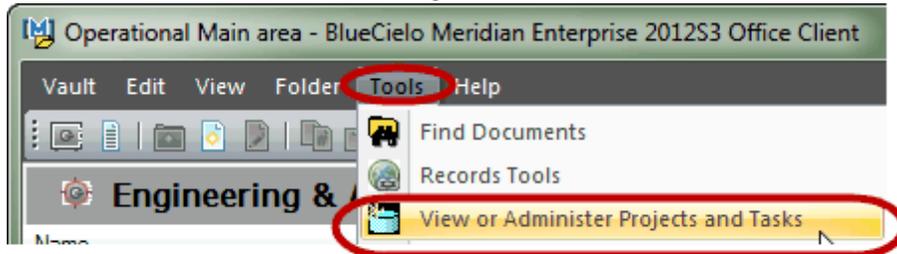
File Name:

Delete Source

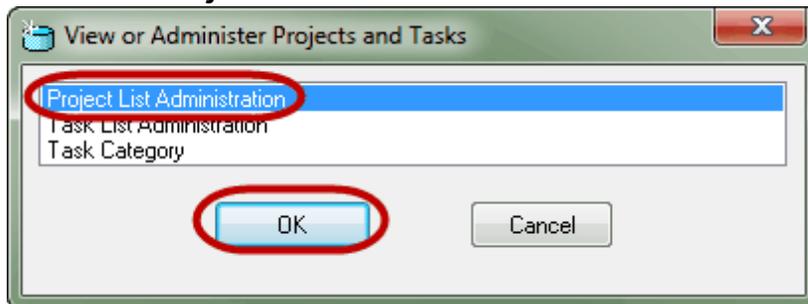
## 4.1.1.1.1.1 Exercise 3

## Project Selection

To access the Project tool, go to the 'Tools' menu, then click on 'View or Administer Projects and Tasks'.



Select 'Project List Administration' and click 'OK'.



Once the Project Tool opens, start performing project searches:

- Search for Spartan Stadium Projects.
- Search for building 0167 Projects
- Search for 2011 Projects
- Search for CP05421
- Search for all Capital Projects
- Search for all projects containing the word 'Exterior'

(did you notice there are different ways to find all of these things?)

## 4.1.1.1.2 General Tab

Now describe the document. Use the magnifying glass icon to select values from a drop down list.

**SubClass** describes what the document is. Different documents may have one or more levels of description required for **SubClass** field.

The image displays three sequential screenshots of the 'Import Project Document.docx - Enter/Edit Properties' dialog box, illustrating the configuration of the 'Sub Class' field. Each screenshot shows the 'General' tab with various fields and a magnifying glass icon for selection.

**Screenshot 1:** The 'Sub Class' field is highlighted with a red oval. The 'ADD' button is selected, and the value 'ADDENDUM' is entered in the adjacent text box.

**Screenshot 2:** The 'Sub Class' field is highlighted with a red oval. The 'NOTICE' button is selected, and the value 'NOTICE' is entered in the adjacent text box. Below it, the 'Sub Class Detail' field is also highlighted with a red oval, with the 'UTILSHUTD' button selected and 'UTILITY SHUTDOWN' entered.

**Screenshot 3:** The 'Sub Class' field is highlighted with a red oval. The 'SPEC' button is selected, and the value 'SPECIFICATIONS' is entered in the adjacent text box. Below it, the 'CSI SubDivision' field is highlighted with a red oval, with the '044000' button selected and 'STONE ASSEMBLIES' entered.

Floors can be chosen if desired. Users can pick as many or as few floors as they need.

Description adds to the file name and helps describe your document further.

The screenshot shows a form with the following fields:

- Floor(s): [Empty]
- Description: specific description
- File Suffix: SPECIFIC DESCRIPTION

A red callout box contains the text: "Fill in a description and File Suffix will auto-populate and become part of the filename."

Originator field is used for the filename.

If Internal is selected, Meridian will name the file according to the way the document was described by you.

The screenshot shows a form with the following fields:

- Originator: INTERNAL
- Source Company: [Empty]
- Orig. FileName: Project Document
- MSU File Name: REC000001\_TESTBAL\_HYDRO\_SPECIFIC DESCRIPTION
- Document Date: 12/13/2013

If External is selected, you will be required to select a source company and Meridian will keep the documents original filename.

The screenshot shows a form with the following fields:

- Originator: EXTERNAL
- Source Company: TAB TAB SERVICES
- Orig. FileName: Project Document
- MSU File Name: REC000001\_TESTBAL\_HYDRO\_SPECIFIC DESCRIPTION
- Document Date: 12/13/2013

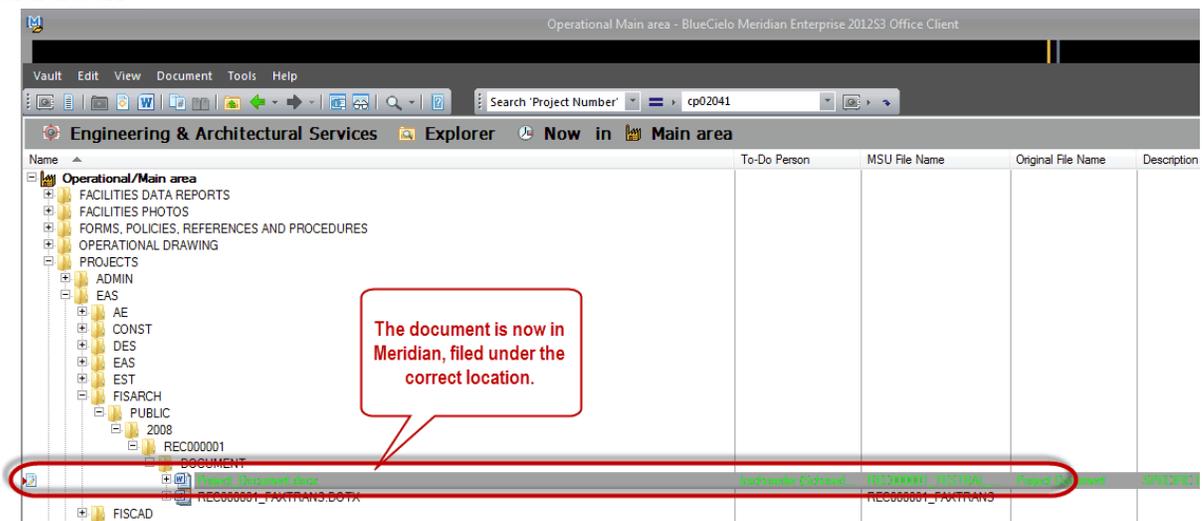
Document Date is not a required field.

## 4.1.1.1.3 Finishing Up

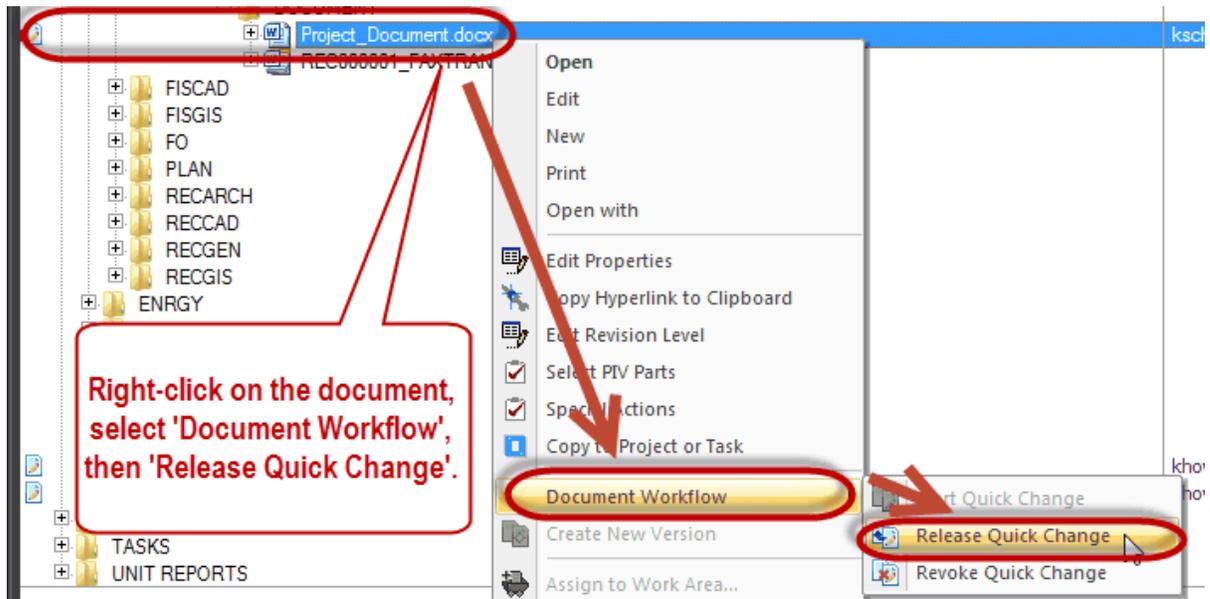
The last thing you will need to do is **Finish** and then **Release** the document into Meridian.



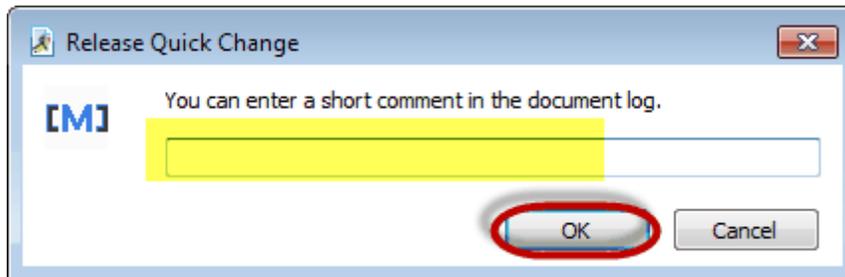
The document you added is now in Meridian, filed correctly. Meridian will automatically take you to the document you just added.



Now you will need to Release the document for Meridian to store the first version of it.



Enter a comment and click 'OK'.



#### 4.1.1.2 Exercise 4

## Drag & Drop a document into Meridian

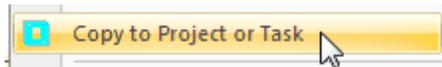
Please Drag & Drop a Project Document into Meridian Projects.

- For this exercise, you can choose any document from anywhere on your computer, it doesn't have to be a real example because we will end up deleting the file from Meridian.
  - \* **Do NOT select 'Delete Source' during this exercise.**
- Add the document as an INTERNAL document. Fill in the Wizard completely and click Finish.
- Add the document as an EXTERNAL document. Fill in the Wizard completely and click Finish.
- Remember to Release the Documents! You can select them both at the same time.

\*you will have 7 minutes\*

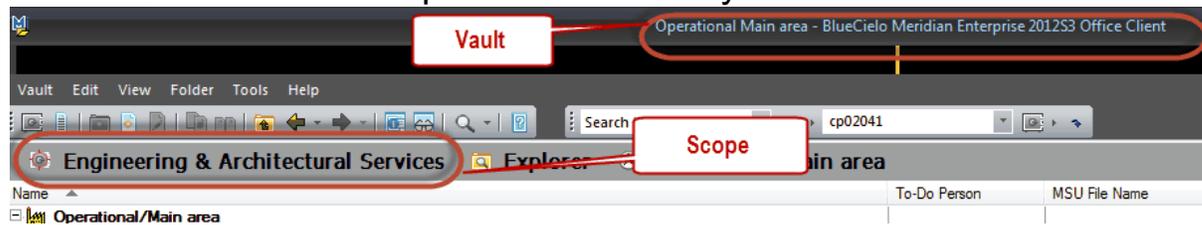
### 4.1.2 Copy to Project or Task

To add a document to the project using a document that is already stored in Meridian, use the 'Copy to Project or Task' feature found in your right-click shortcut menu.



Adding documents this way ensures you are using the most current version of the form or standard for your project.

To Begin, make sure you are in the Operational Vault and Scope that best describes which Department or Crew you work for.



#### 4.1.2.1 Forms and Templates

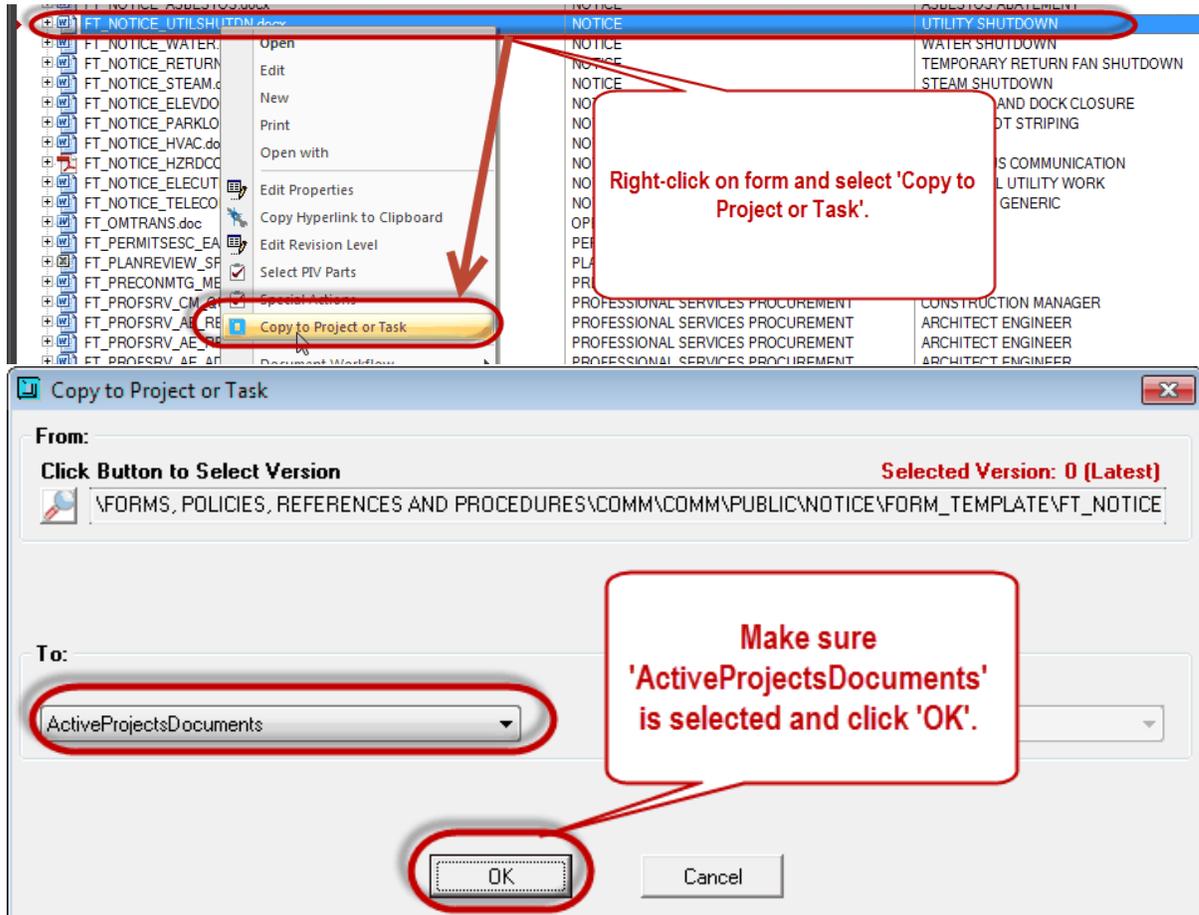
To add a form or template to a project in Meridian, locate the form or template.

1. Navigate to the form you want to use for your Project.

The first screenshot shows the 'Engineering & Architectural Services' Explorer view. The 'Forms and Templates - EAS - Design' folder is selected. A red callout box points to the 'Forms and Templates - EAS - Design' folder with the text: 'Use the Nav Views to access Forms'. The second screenshot shows the 'Forms and Templates - EAS - Design' view. The 'Forms and Templates - EAS - Design' folder is selected in the breadcrumb. A red circle highlights the folder name in the breadcrumb. Below, a table lists various forms and templates, with 'FT\_NOTICE\_UTILSHUTDN.docx' and 'UTILITY SHUTDOWN' highlighted by a red circle.

Name	Doc SubClass	Doc SubClass Detail
FT_NOTICE_POOL.docx	NOTICE	POOL SHUTDOWN
FT_NOTICE_CRANELIFT.docx	NOTICE	CRANE LIFT
FT_NOTICE_CONPRJCOMM.docx	NOTICE	CONSTRUCTION PROJECT COMMUNICA...
FT_NOTICE_CONSTJUNC.docx	NOTICE	CONSTRUCTION JUNCTION
FT_NOTICE_ROOF.docx	NOTICE	ROOFING REPAIRS
FT_NOTICE_BOILER.docx	NOTICE	BOILER SHUTDOWN
FT_NOTICE_ASBESTOS.docx	NOTICE	ASBESTOS ABATEMENT
FT_NOTICE_UTILSHUTDN.docx	NOTICE	UTILITY SHUTDOWN
FT_NOTICE_WATER.docx	NOTICE	WATER SHUTDOWN
FT_NOTICE_RETURNFAN.docx	NOTICE	TEMPORARY RETURN FAN SHUTDOWN
FT_NOTICE_STEAM.docx	NOTICE	STEAM SHUTDOWN

## 2. Right-click on form and select 'Copy to Project or Task'



### 3. Fill in the wizard.

Project Document | General | Notes

**Project**


**Buildings**

--

---

**Department** | EAS | ENGINEERING AND ARCHITECTURAL SERVICES

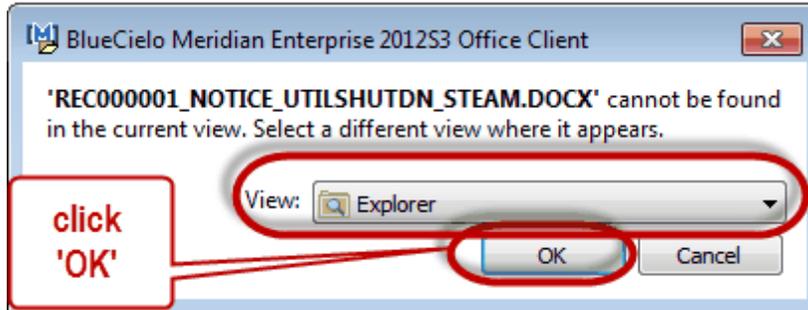
**Crew** | FISARCH | RECORDS - ARCHIVES

File Name:

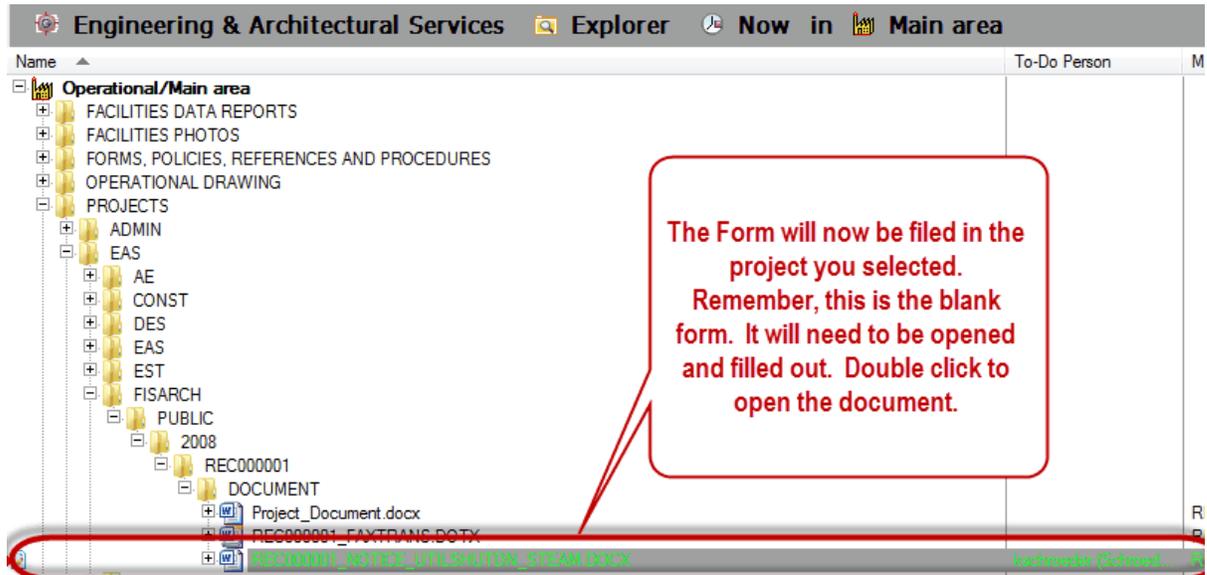
Finish | Cancel

Fill in the wizard, then click 'Finish'

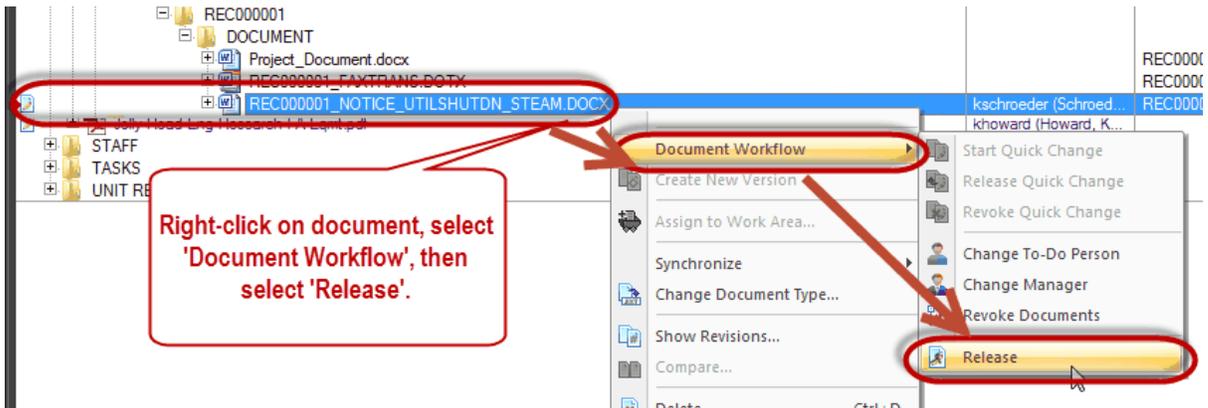
Once you have clicked 'Finish', because you are in a different Nav View where project documents do not exist, Meridian will ask to switch to the 'Explorer' view (or you can select a different Nav View) in order to view the document you just added to Projects.



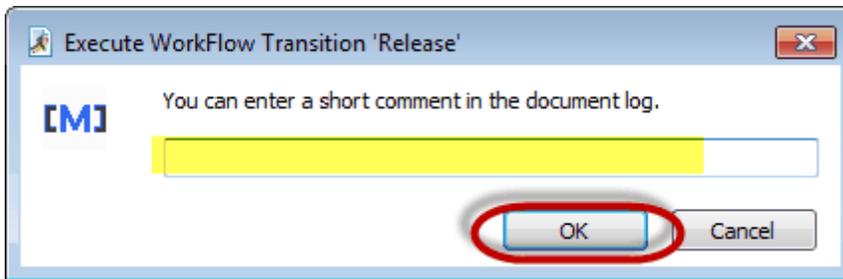
#### 4. Work on the document



## 5. Release the document



Enter a comment and click 'OK'.



## 4.1.2.1.1 Exercise 5

## Use 'Copy to Project or Task' to add a form to a project in Meridian

Please use Meridian Forms and Templates to copy a document to Meridian Projects.

- Fill in the Wizard completely and click Finish.
- Remember to Release the Document!

\*you will have 5 minutes\*

#### 4.1.2.2 Construction Standards

To add a Construction Standard to a project in Meridian, locate the Standard.

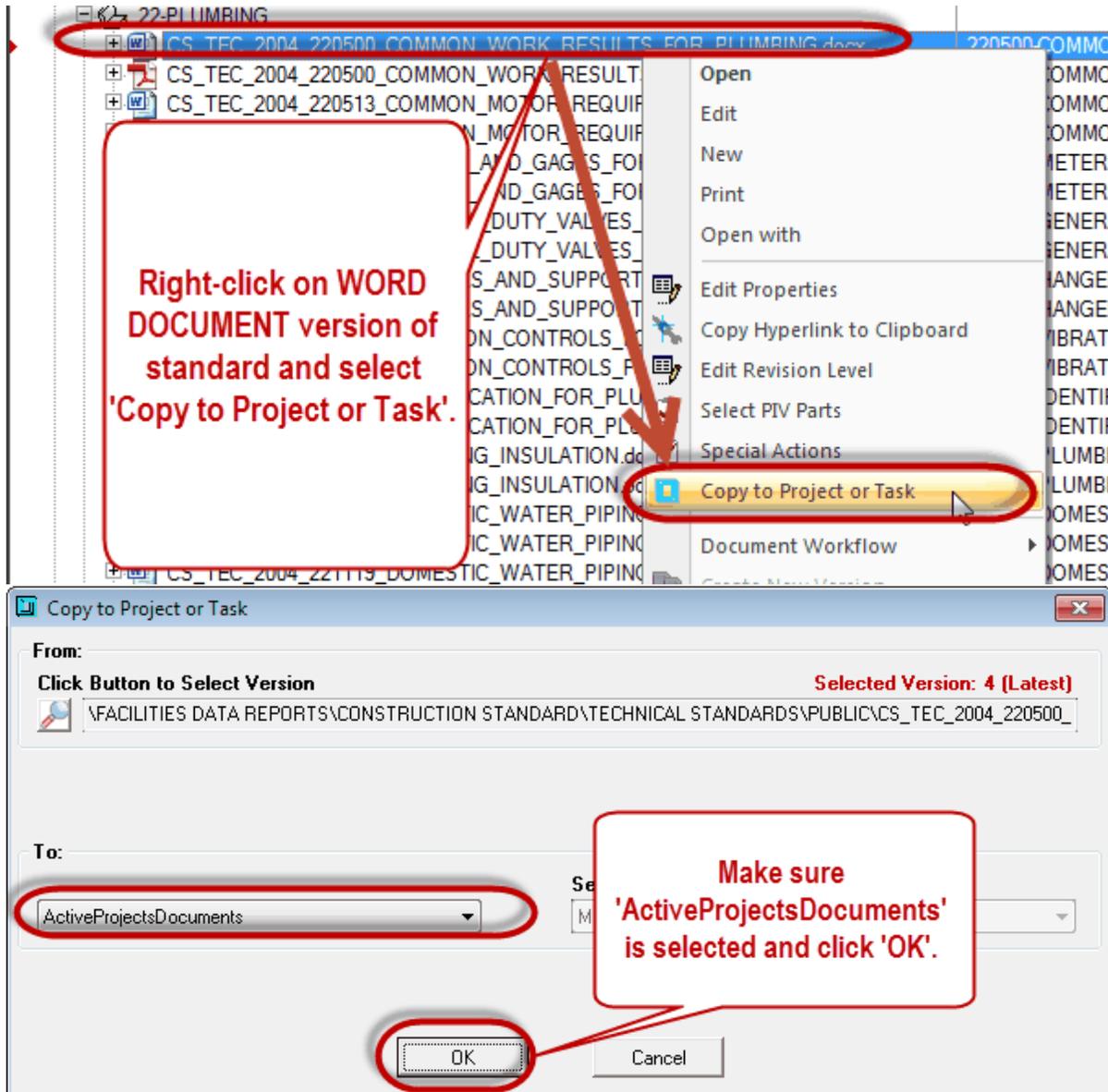
1. Navigate to the Standard you want to use for your Project.

The screenshot shows the BlueCielo Meridian Enterprise 201253 Office Client interface. The top navigation bar includes 'Engineering & Architectural Services', 'Explorer', 'Now in', and 'Main area'. The 'Explorer' tab is selected, showing a tree view of 'Construction Standards - All' with sub-items: 'Construction Standards - Design Guidelines', 'Construction Standards - Front End Documents', 'Construction Standards - Standard Details', and 'Construction Standards - Technical Standards'. A red callout box with a red border contains the text: 'Use the Nav Views to access the Standards.'

The second screenshot shows the 'Construction Standards - Technical Standards' view. The left pane shows a tree view with '21-FIRE SUPPRESSION' expanded to '22-PLUMBING'. A red circle highlights the file 'CS\_TEC\_2004\_220500\_COMMON\_WORK\_RESULTS\_FOR\_PLUMBING.docx'. The right pane shows a table with columns: Name, CSI Sub Division Info, File Type, To-Do Person, and Modified. The table contains three rows of data.

Name	CSI Sub Division Info	File Type	To-Do Person	Modified
CS_TEC_2004_220500_COMMON_WORK_RESULTS_FOR_PLUMBING.docx	220500-COMMON ...	Microsoft Office Wor...		Pnng...
CS_TEC_2004_220500_COMMON_WORK_RESULTS_FOR_PLUMBING.pdf	220500-COMMON ...	PDF File		Pnng...
CS_TEC_2004_220513_COMMON_MOTOR_REQUIREMENTS_FOR_PLUMBING E...	220513-COMMON M...	Microsoft Office Wor...		fraze...

2. Right-click on **word document** version of the construction standard and select 'Copy to Project or Task'



### 3. Fill in the wizard.

Project Document | General | Notes

**Project**

**Buildings**

**Department** EA ENGINEERING AND ARCHITECTURAL SERVICES

**Crew** FI RECORDS - ARCHIVES

File Name:

Finish Cancel

Fill in the wizard, then click 'Finish'.

## Select 'Specification', then select the 'CSI Subdivision'

Project Document | General | Notes

**Sub Class** SPEC SPECIFICATIONS

**CSI SubDivision** 220500 COMMON WORK RESULTS FOR PLUMBING

**Security Level** PB PUBLIC

Floor(s)

Description

File Suffix

**Originator** RNAL

Source Comp

Orig. FileName

MSU File Name

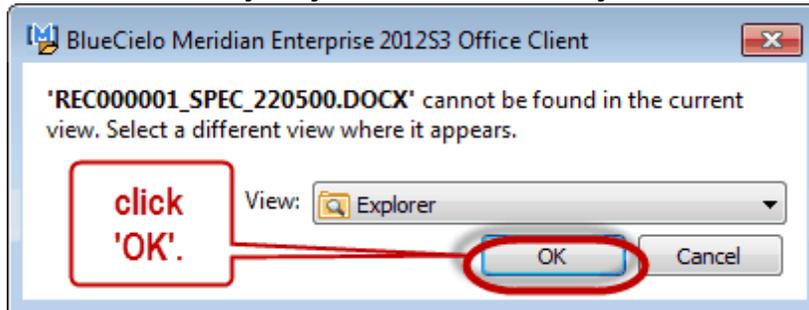
Document Date 12/13/2013

File Name:

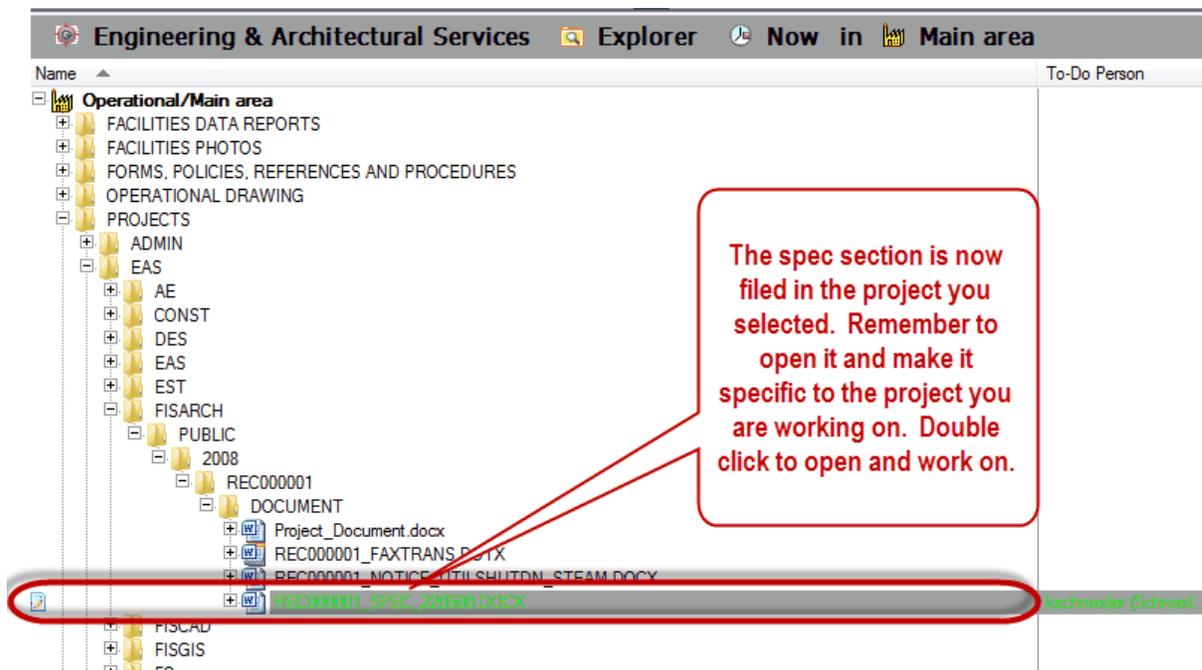
Finish Cancel

**On the general tab, you will select Specification. Then you will be required to fill out the CSI subdivision.**

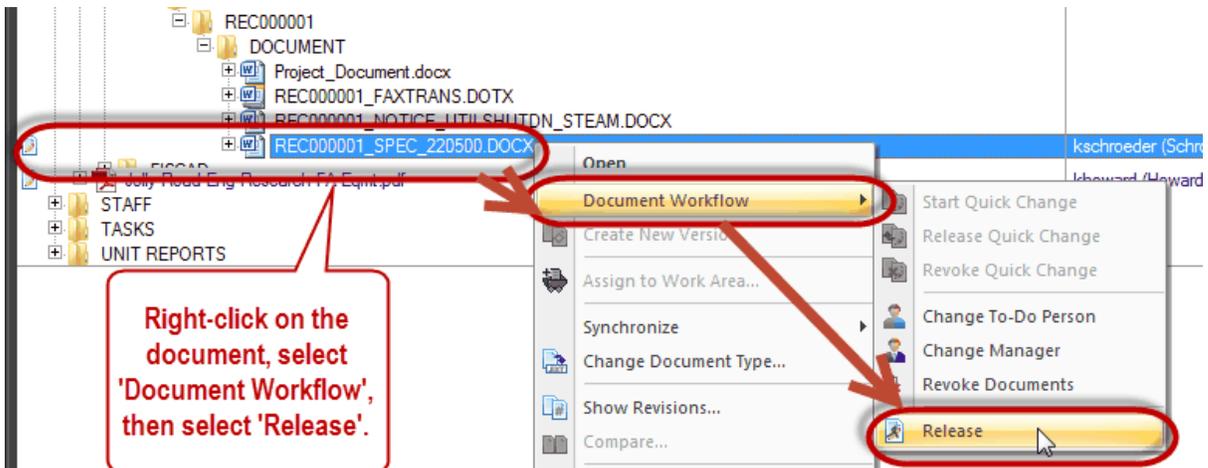
Once you have clicked 'Finish', because you are in a different Nav View where project documents do not exist, Meridian will ask to switch to the 'Explorer' view (or you can select a different Nav View) in order to view the document you just added to Projects.



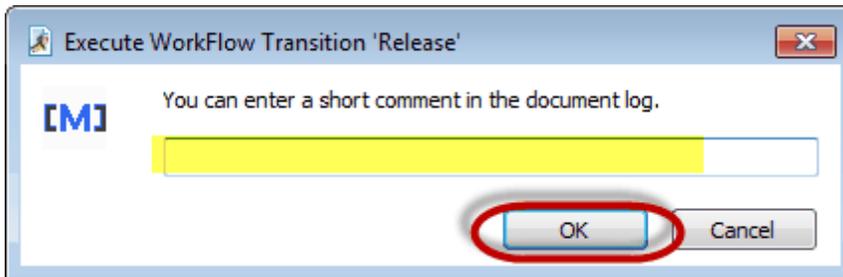
#### 4. Work on the document



## 5. Release the document



Enter a comment and click 'OK'.



## 4.1.2.2.1 Exercise 6

## Use 'Copy to Project or Task' to add a construction standard to a project in Meridian

Please use Construction Standards to copy a construction standard file to Projects.

**\* Use the same project number from exercise 4**

- Fill in the Wizard completely and click Finish.
- Remember to Release the Documents!

\*you will have 7 minutes\*

## 4.2 Modifying Documents

Modifying documents is used to update or replace the current document in Meridian.

Based on whether it is an internal or external document, you will either open and edit the document or replace the document content completely with a new file.

- Internal Documents will most likely be modified by our staff and therefore you will open for editing and make changes and save them within Meridian.
- External Documents will most likely have been received from an outside source and therefore are already updated. They will need to be added to Meridian by replacing the current documents.

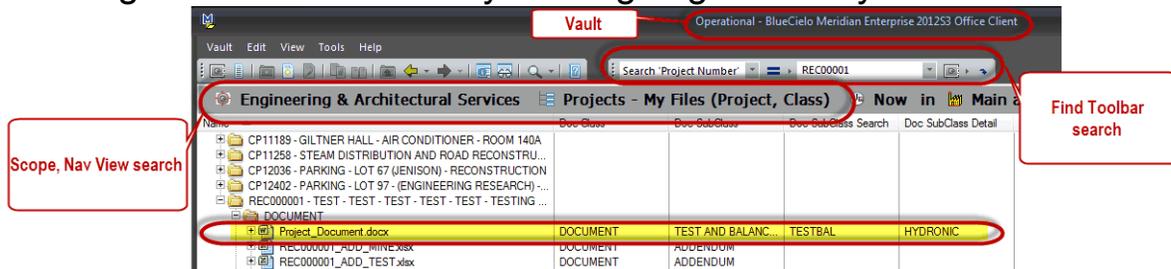
You will:

1. Start a Quick Change
2. Modify the Document
3. Release the Quick Change

**\*\*\*Modifying the Document does NOT change the indexing information about that document. It only changes the document content.\*\*\***

## To Start a Quick Change:

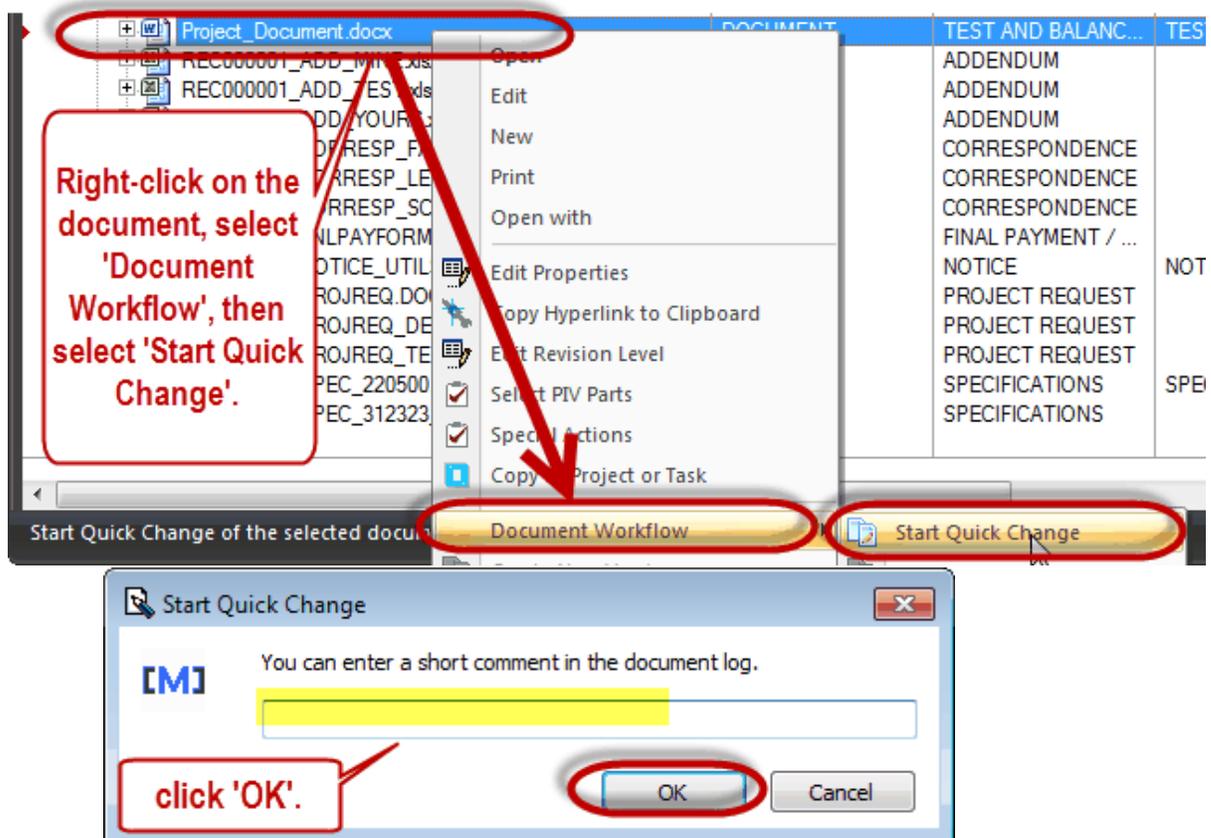
1. Navigate to the document you are going to modify.

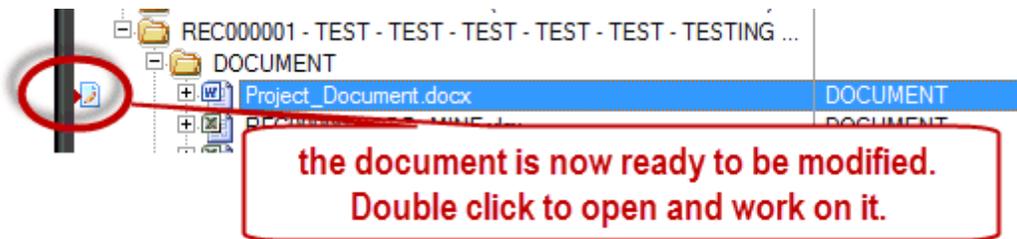


2. Select the document you are going to modify and start Quick Change.

a. Right-click method (use for either external or internal documents)

1. Select Document Workflow, Start Quick Change, click OK, then double-click on the Document to work on it.

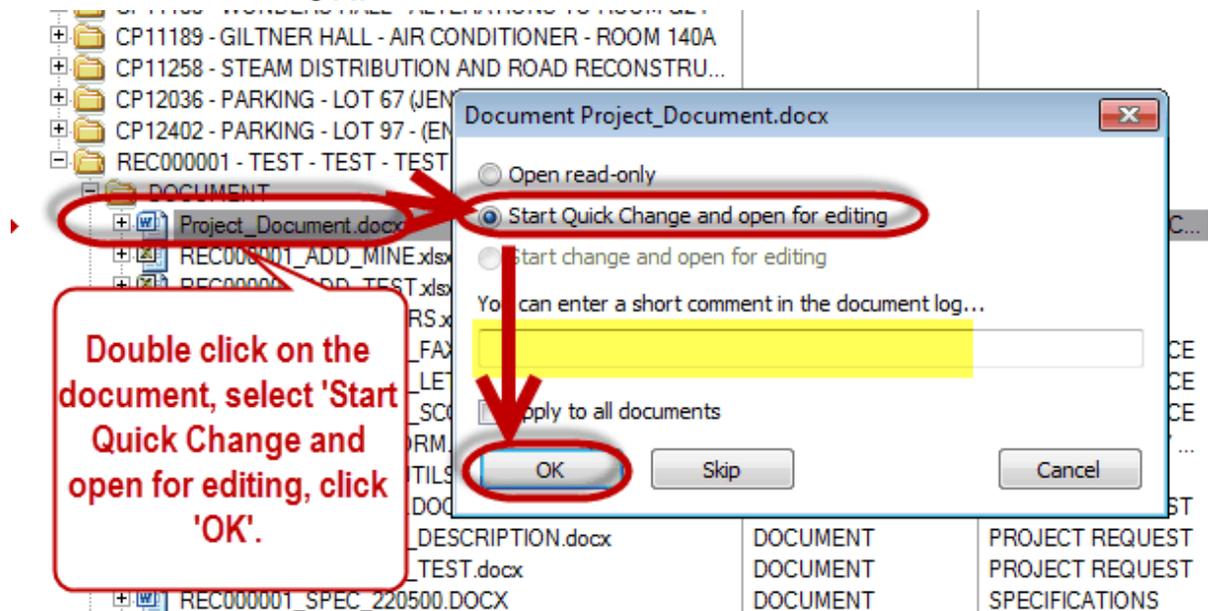




Or,

### B. Double-Click method (only for internal documents)

1. Select 'Start Quick Change and open for editing', click OK.



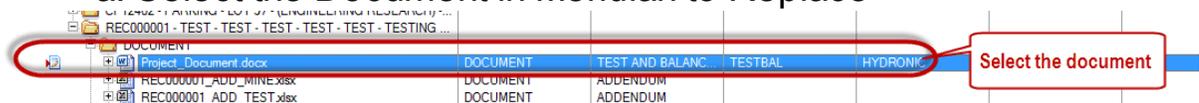
## To Make Modifications:

### 1. If **Internal Document:**

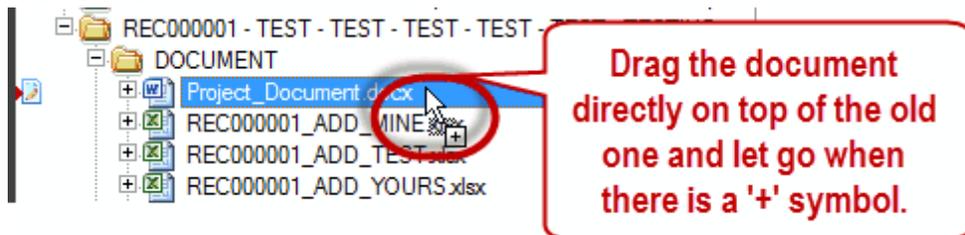
- a. Double-click and Open it for editing
  - b. Make any changes
  - c. Save the document
  - d. close the document
- When you save, you should NOT have to pick the location, it should automatically save into the correct location in Meridian.

### 2. If **External Document: Replace Document Content**

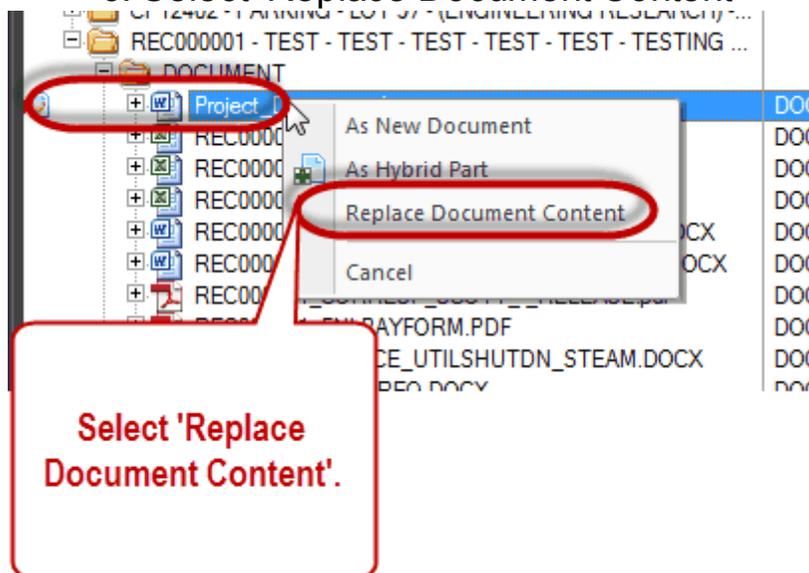
#### a. Select the Document in Meridian to Replace



#### b. Drag the new document into Meridian ON TOP of current Document

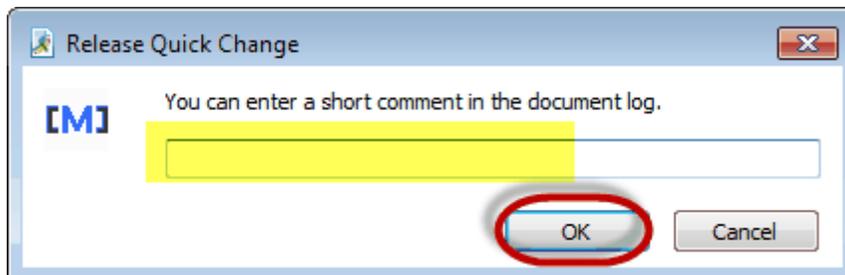
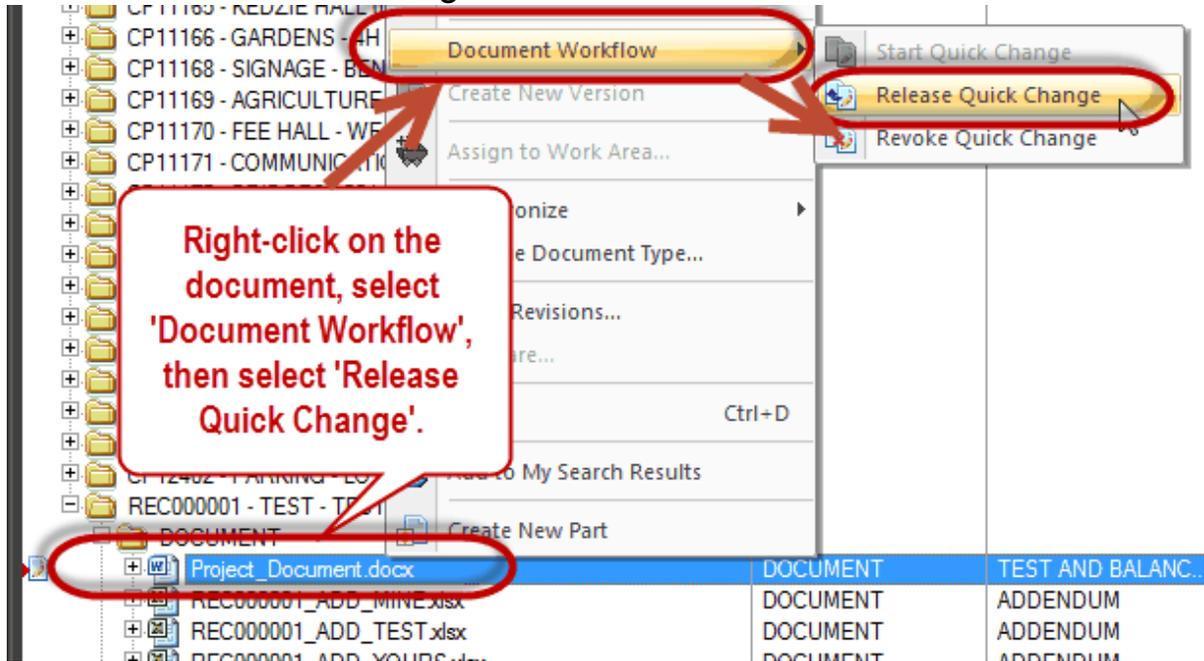


#### c. Select 'Replace Document Content'



### To Release the Quick Change:

1. Select the document(s) and right-click, select 'Document Workflow', then 'Release Quick Change'



The documents are now released back into Meridian and reflect the modifications.

#### 4.2.1 Exercise 7

### Modifying documents in Meridian Projects

1. Choose one of the Project Documents you added in earlier exercises to modify.

- Start a Quick Change and open the document for editing.
- Modify the document and save the changes.
- Release the Quick Change.

#### Now...

- Start a Quick Change.
- Replace the document content. (for this exercise, you can either find a different file on your computer or copy this one out and drag it right back in)
- Release the Quick Change.

\*you will have 10 minutes\*

### 4.3 Editing Document Properties

'Edit Properties' is used to make changes to the indexed information for the document in Meridian.

You will use the Wizard to Edit Properties.

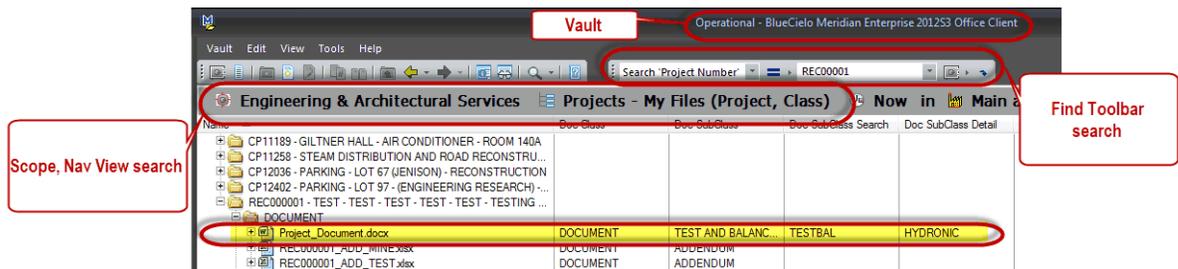
**\*\*\*Editing properties does NOT change the document content, only the indexed information.\*\*\***

Editing Properties does not create a version in the Version History.

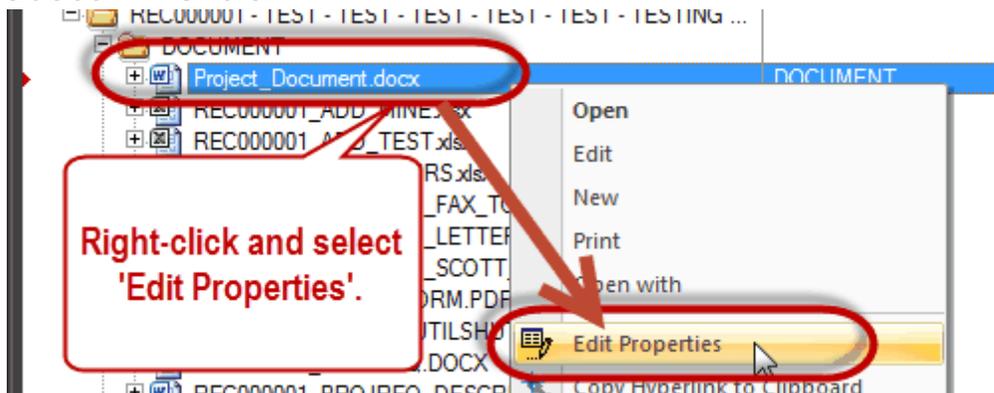
Depending on what fields you edit and whether or not it is an internal or external document, the filename may change.

#### To Edit Properties:

1. Find the document in Meridian.



2. Right-Click on the document you would like to change the information about in Meridian.



3. The Wizard will come up, replace any information you need to change.

The screenshot shows a dialog box titled "Create 'Project\_Document.docx' - Enter/Edit Properties". The dialog has tabs for "Project Document", "General", and "Notes". The "General" tab is active. The dialog contains several fields and sections:

- Sub Class:** TESTBAL
- Sub Class Detail:** HYDRO, HYDRONIC
- CSI SubDivision:** (empty)
- Security Level:** PB, PUBLIC
- Floor(s):** (empty table)
- Description:** edited
- File Suffix:** EDITED
- Originator:** INTERNAL
- Source Company:** (empty)
- Orig. FileName:** Project Document
- MSU File Name:** REC000001\_TESTBAL\_HYDRO\_EDITED
- Document Date:** 12/13/2013

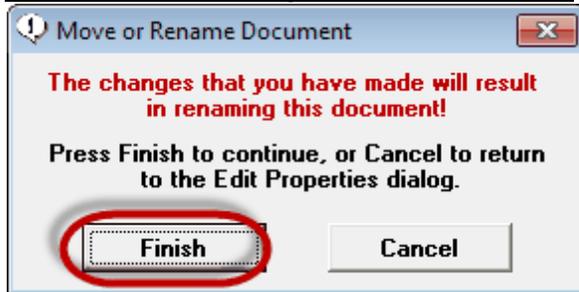
At the bottom of the dialog, there is a "File Name:" field containing "REC000001\_TESTBAL\_HYDRO\_EDITED". Below this field is a "Store as My Default" checkbox. At the bottom right, there are "Finish" and "Cancel" buttons. A "View" button is also present near the "File Name" field.

Annotations in red callouts point to the following elements:

- old filename:** Points to the title bar of the dialog box.
- edited fields:** Points to the "Description" and "File Suffix" fields.
- new filename:** Points to the "File Name:" field.
- click 'Finish':** Points to the "Finish" button.

Certain indexing properties affect the filename. If you changed one that does, you will get the following messages.

### Filename Change: Click Finish



The Properties are now edited, but remember the document content is NOT changed.

#### 4.3.1 Exercise 8

### Editing Properties in Meridian Projects

1. Choose one of the Project Documents you just modified and edit the properties.

\*you will have 3 minutes\*

## 5 Project Drawings

### Overview:

- Project Drawings in Meridian Operational Vault will house all the CAD and Revit drawings you are working on.
- Meridian will create references for X-refs as long as all the files are stored in Meridian.
- Meridian Projects is NOT the final resting place of all Drawings. Some will have to be added to the Skire Document Manager and the final tif versions will be added to Meridian Project Archives.
- The Capital Projects Procedures webpage will tell you about which drawings should go where and who is responsible for putting them there.

<http://staff.eas.msu.edu/index.cfm/capital-project-procedures/>

### Permissions:

- All EAS staff members have the permissions to add, edit properties, modify the drawings and delete the drawings in Projects. Meridian has a very powerful version history. It keeps track of who added or made any changes to a drawing, when they did it, what they changed and also allows you to access all previous versions of that drawing.

### Autocad Integration with Meridian:

- Users need to confirm Meridian integration is working by checking the command line at start-up of Autocad. The following message should be echoed to the command line:

**BlueCielo: The BlueCielo AutoCAD Link is loaded.**

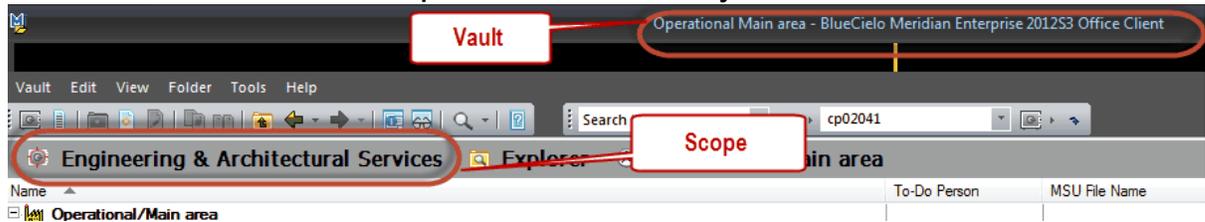
## 5.1 Adding Drawings

- There are different choices for adding drawings to Projects.
  1. Drag & Drop a drawing from outside of Meridian into Projects
  2. Copy to a Project or Task:
    - a. using a Title Block Template stored in Meridian
    - b. using an Operational Drawing stored in Meridian
    - c. using a Standard Detail stored in Meridian
    - d. using a drawing in the Projects area.

### 5.1.1 Drag & Drop

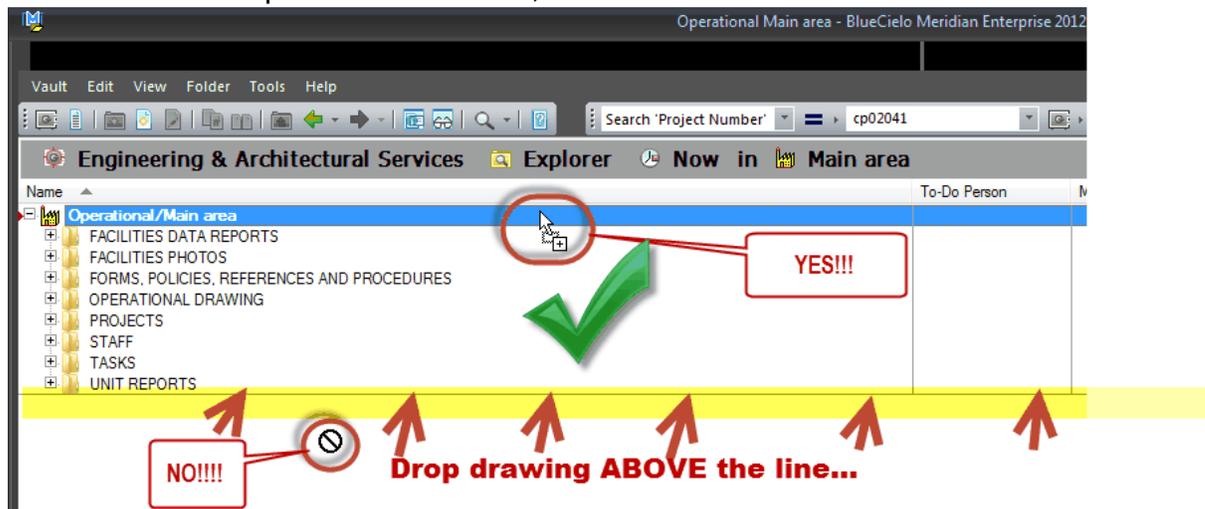
To add a drawing that was created outside of Meridian into the system, select the file and drag and drop it into Meridian.

To Begin, make sure you are in the Operational Vault and Scope that best describes which Department or Crew you work for.

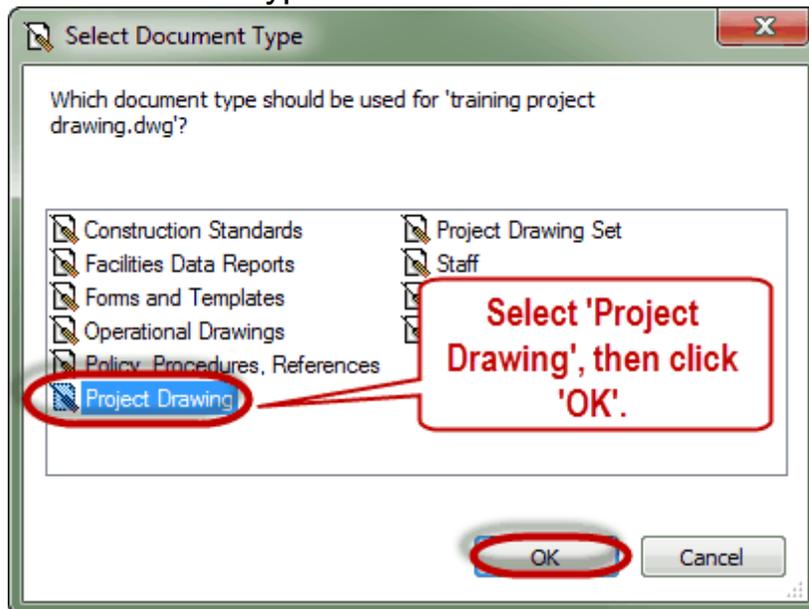


Find the drawing you are going to add and drag it into Meridian. You do NOT need to conduct a search first.

- Meridian will file the drawing based on the indexing properties you fill in, so the location you drop it in doesn't matter other than making sure you are in the Operational Vault.
- Make sure to drop it ABOVE the line, where the folder structure shows.



### 3. Document Type Selection



Now you are ready to Describe the Drawing you are adding to Meridian.

## 5.1.1.1 Describe the Drawing

## 4. Fill in the Wizard...

The **Wizard** is the dialog box that comes up when you are **adding a drawing or editing drawing properties.**

It contains the indexing fields you will fill in so that Meridian can file the drawing appropriately and everyone working on Capital Projects can find that drawing if they need to.

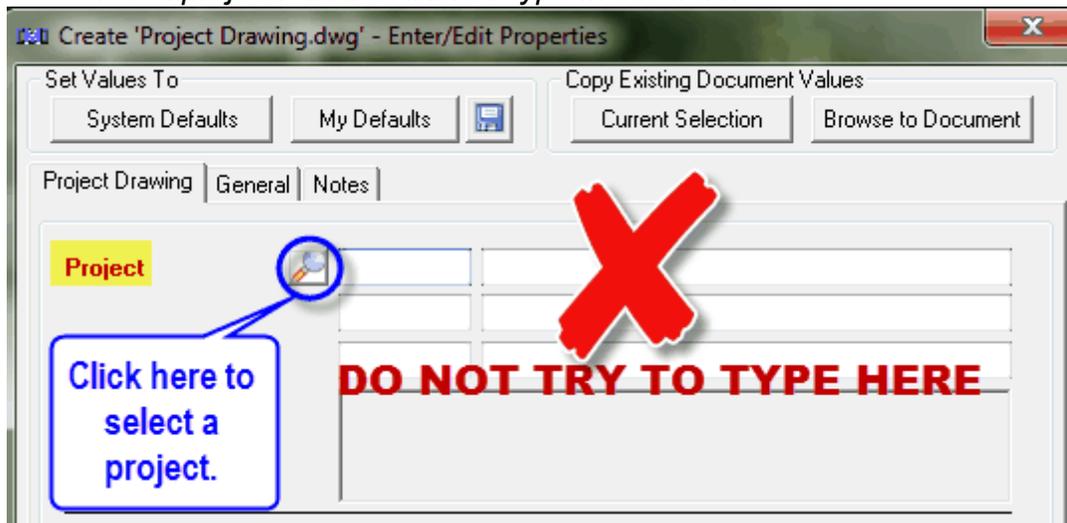
- **Red** fields are required
- Black are optional
- There are 3 tabs where information can be filled out
-  magnifying glass icons are drop-down lists for choosing pre-determined values
-  View button allows you to open and view the document you are adding in order to describe it correctly.

## 5.1.1.1.1 Project Drawing Tab

The Project Drawing Tab is where you will fill out the Project Information.

The first thing you will need to do is pick the Project this drawing should be filed under.

- Click on the magnifying glass next to project. *\*There is NO other way to select a project. You CANNOT type in this field.*



For instructions on using the Project Selection Tool, please refer to the [Project Document Tab](#) section in training manual.

Create 'Project Drawing.dwg' - Enter/Edit Properties

Set Values To: System Defaults My Defaults 

Copy Existing Document Values: Current Selection Browse to Document

Project Drawing | General | Notes

<b>Project</b>	 1	LEGACY
	REC000001	TEST - TEST - TEST - TEST - TEST - TESTING - TES
	2008	
<b>Buildings</b>	<input checked="" type="checkbox"/> 0001	PAOLUCCI BUILDING

<b>Department</b>	 EAS	ENGINEERING AND ARCHITECTURAL SERVICES
<b>Crew</b>	 FISARCH	RECORDS - ARCHIVES

**Now the project information is filled out and also Meridian should have auto-populated the department and crew fields based on your user information.**

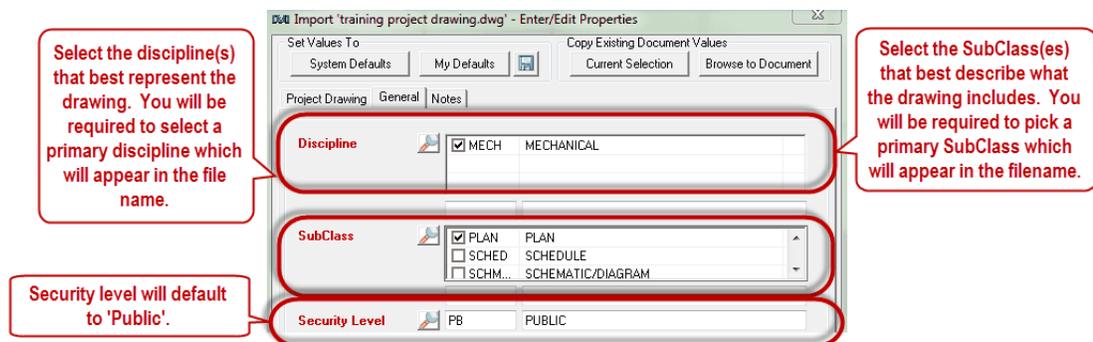
File Name:

Finish Cancel

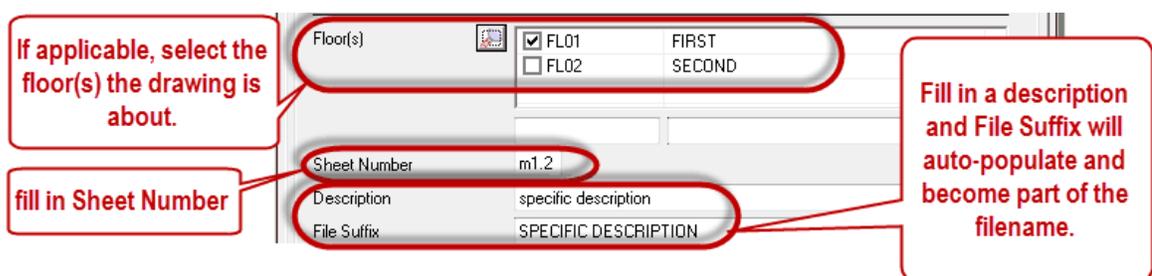
## 5.1.1.1.2 General Tab

The next thing you will need to do is describe the drawing. Again, use the magnifying glass icon to select values from a drop down list.

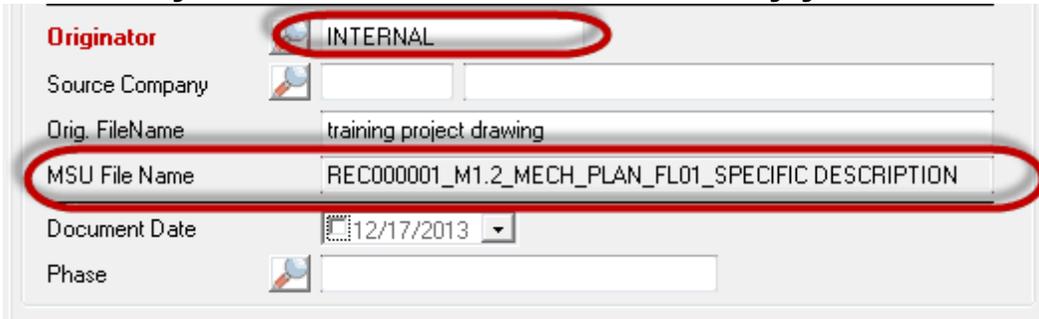
- **Discipline** - select as many disciplines as needed to describe the drawing(s).
- **Subclass** - select as many subclasses as need to describe the drawing(s).
- **Security** will default to public.



- **Floors** can be chosen if desired. Users can pick as many or as few floors as they need.
- **Description** adds to the file name and helps describe your document further.



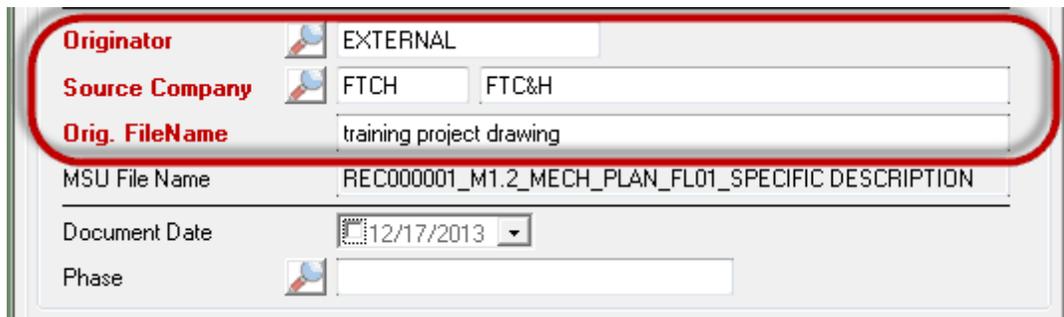
- **Originator field is used for the filename.**
  - **If Internal is selected, Meridian will name the file according to the way the document was described by you.**



The screenshot shows a form with the following fields:

<b>Originator</b>	INTERNAL
Source Company	
Orig. FileName	training project drawing
<b>MSU File Name</b>	REC000001_M1.2_MECH_PLAN_FL01_SPECIFIC DESCRIPTION
Document Date	12/17/2013
Phase	

- **If External is selected, you will be required to select a source company and Meridian will keep the documents original filename.**



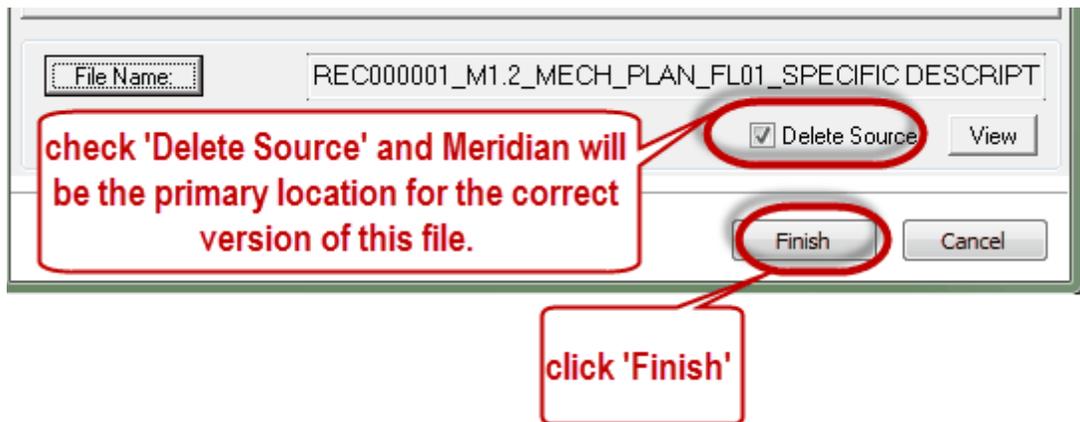
The screenshot shows a form with the following fields:

<b>Originator</b>	EXTERNAL
<b>Source Company</b>	FTCH FTC&H
<b>Orig. FileName</b>	training project drawing
MSU File Name	REC000001_M1.2_MECH_PLAN_FL01_SPECIFIC DESCRIPTION
Document Date	12/17/2013
Phase	

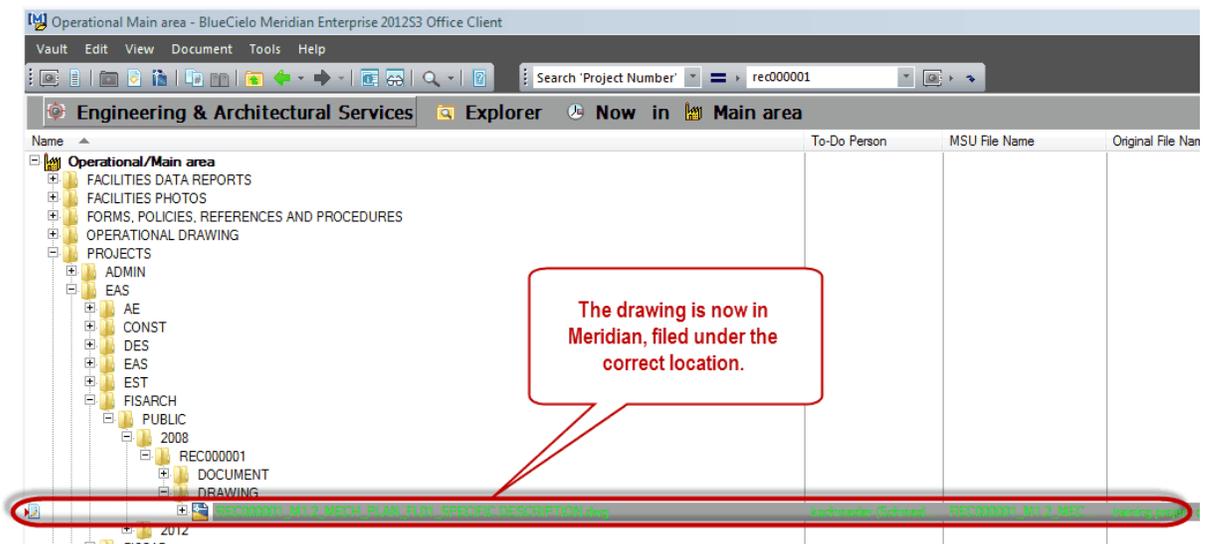
- **Document Date and Phase are not required fields as this drawing is expected to be modified during the life of the project.**

## 5.1.1.1.3 Finishing the Wizard

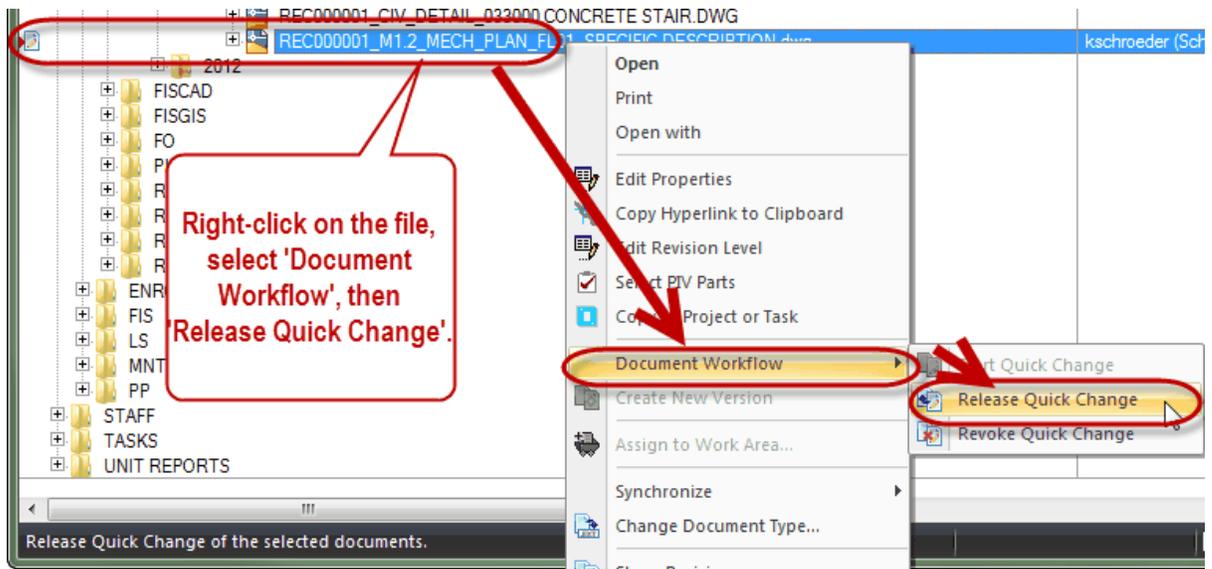
The last thing you will need to do is **Finish** and then **Release** the drawing into Meridian.



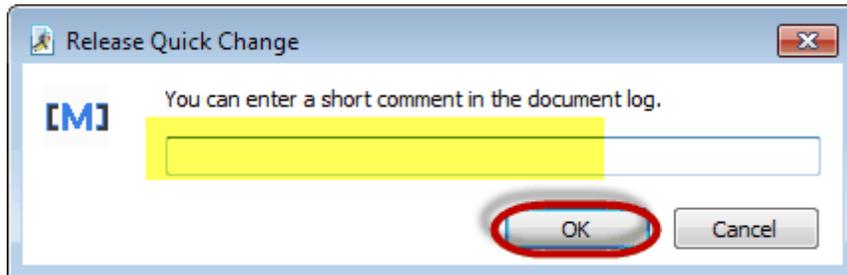
The drawing you added is now in Meridian, filed correctly. Meridian will automatically take you to the drawing you just added.



Now you will need to **Release** the drawing for Meridian to store the first version of it.



Enter a comment and click 'OK'.



## 5.1.1.2 Exercise 9

## Drag & Drop a drawing into Meridian

Please Drag & Drop a Project Drawing into Meridian Projects.

**\* Use the same project number from exercise 4**

For this exercise, you can choose any document from anywhere on your computer.

**\* Do NOT select 'Delete Source' during this exercise. You will add the same document twice.**

Add the document as an INTERNAL document. Fill in the Wizard completely and click Finish.

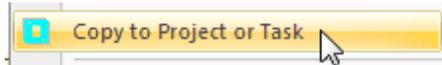
Add the document as an EXTERNAL document. Fill in the Wizard completely and click Finish.

Remember to Release the Documents! You can select them both at the same time.

**\*you will have 7 minutes\***

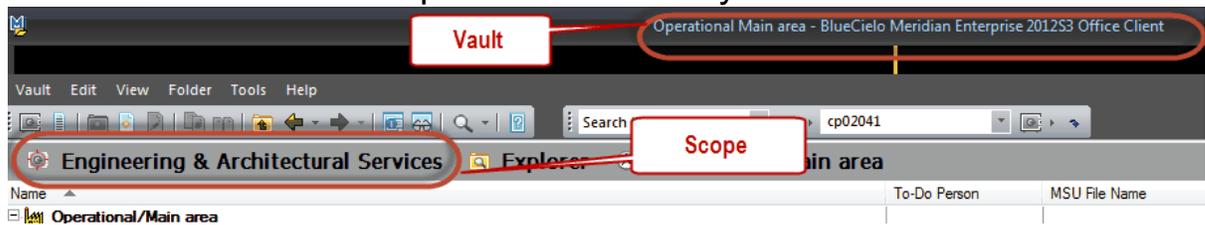
### 5.1.2 Copy to Project or Task

To add a drawing to the project using a file that is already stored in Meridian, use the 'Copy to Project or Task' feature found in your right-click shortcut menu.



Adding drawings this way ensures you are using the most current version of that file for your project.

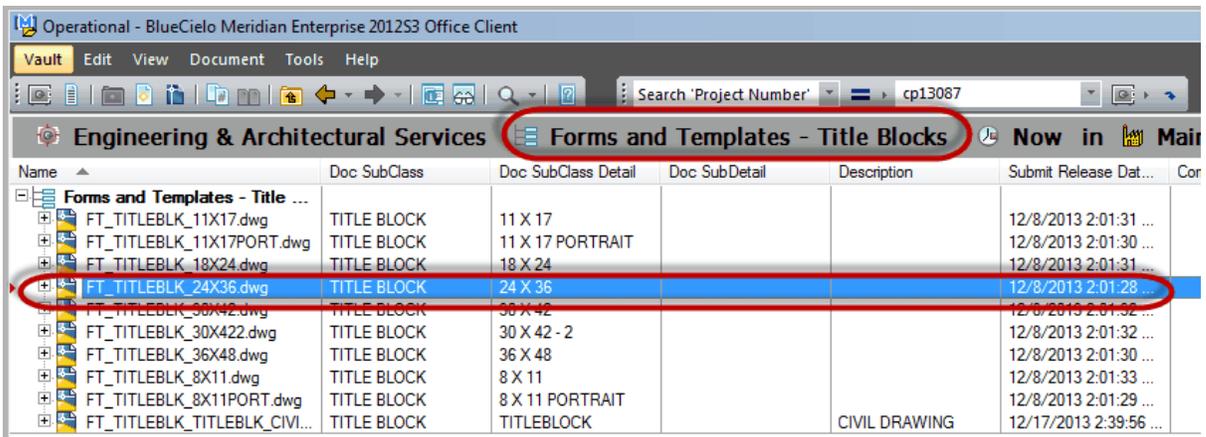
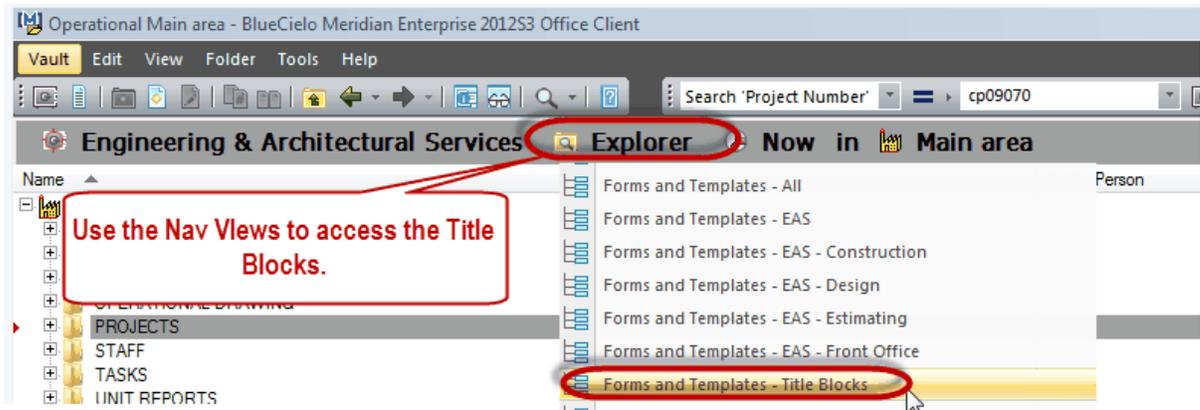
To Begin, make sure you are in the Operational Vault and Scope that best describes which Department or Crew you work for.



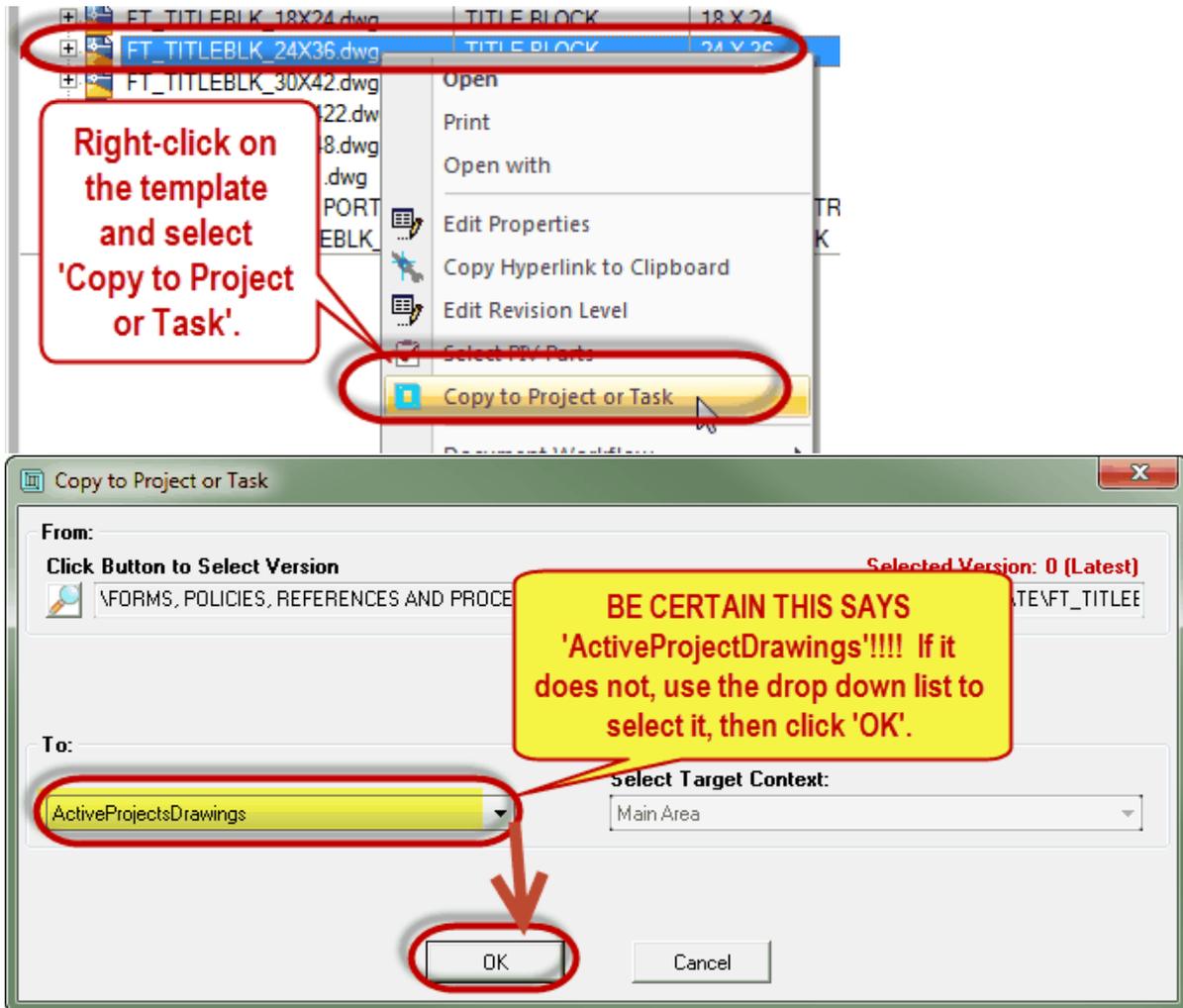
### 5.1.2.1 Title Block Templates

1. To add a Title Block template to a project in Meridian, navigate to the Title Block template you want to use for your Project.

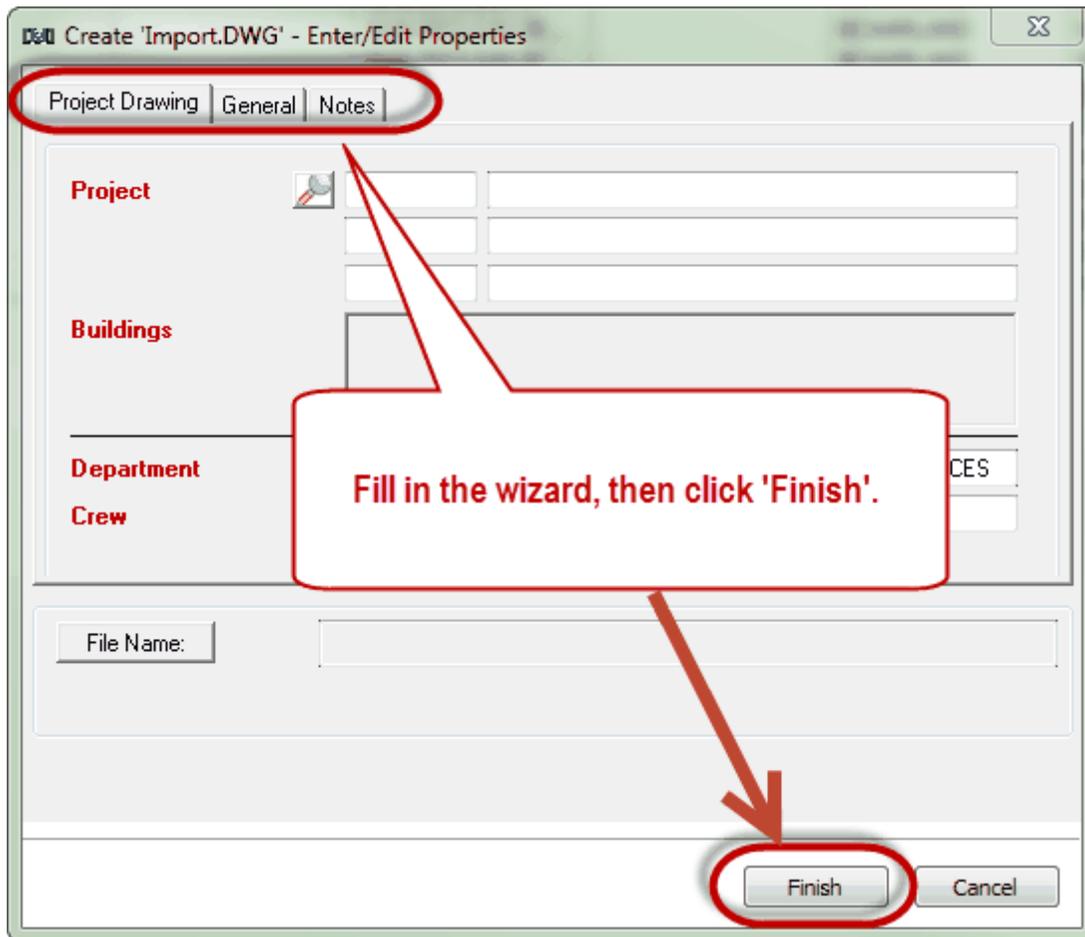
These are stored in Meridian under Forms and Templates.



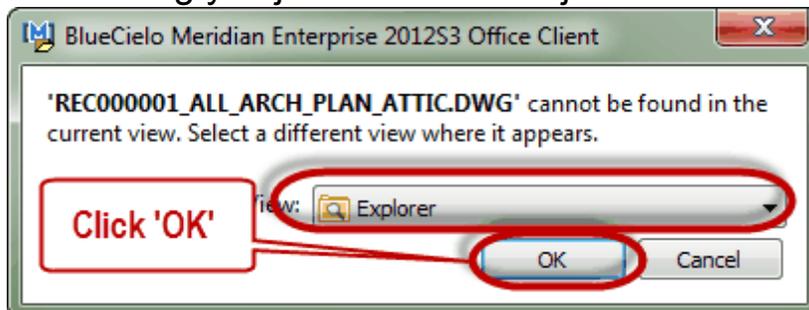
## 2. Right-click on the template and select 'Copy to Project or Task'



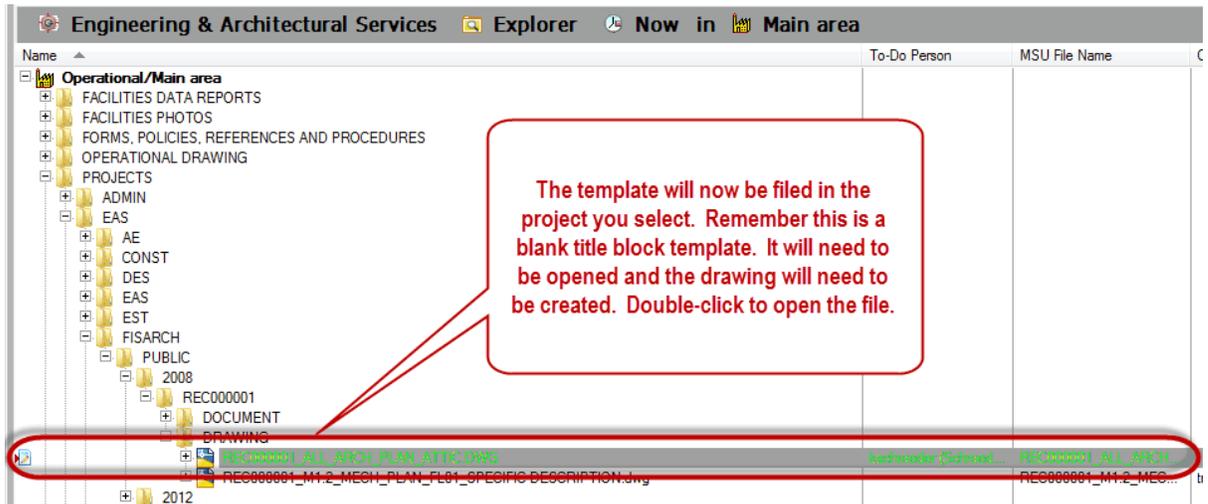
### 3. Fill in the wizard.



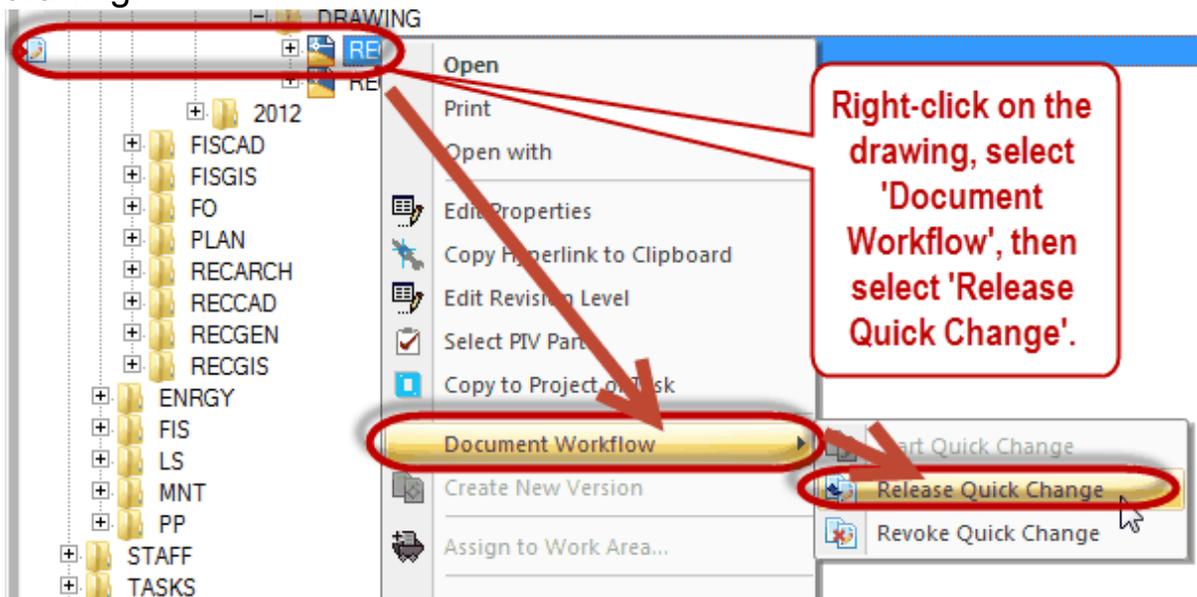
Once you have clicked 'Finish', because you are in a different Nav View where project drawings do not exist, Meridian will ask to switch to the 'Explorer' view (or you can select a different Nav View) in order to view the drawing you just added to Projects.



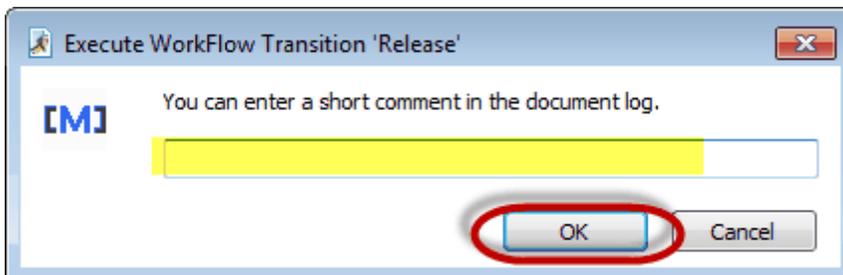
#### 4. Work on the drawing



5. Once you have finished working on the drawing (does not have to be completely finished, you might be done for the day), release the drawing.



Enter a comment and click 'OK'.



## 5.1.2.1.1 Exercise 10

## Use 'Copy to Project or Task' to add a title block template to a project in Meridian

Please use Meridian Forms and Templates to copy a title block template to Meridian Projects.

- Fill in the Wizard completely and click Finish.
- Remember to Release Quick Change!

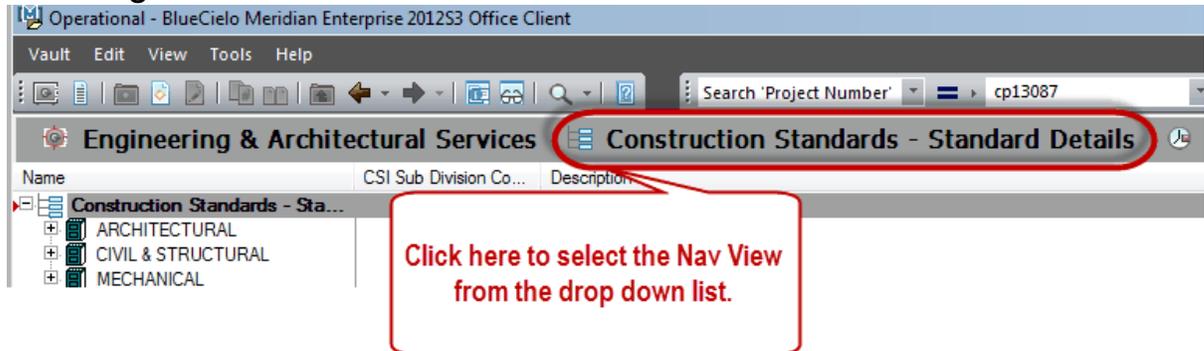
\*you will have 5 minutes\*

### 5.1.2.2 Standard Details

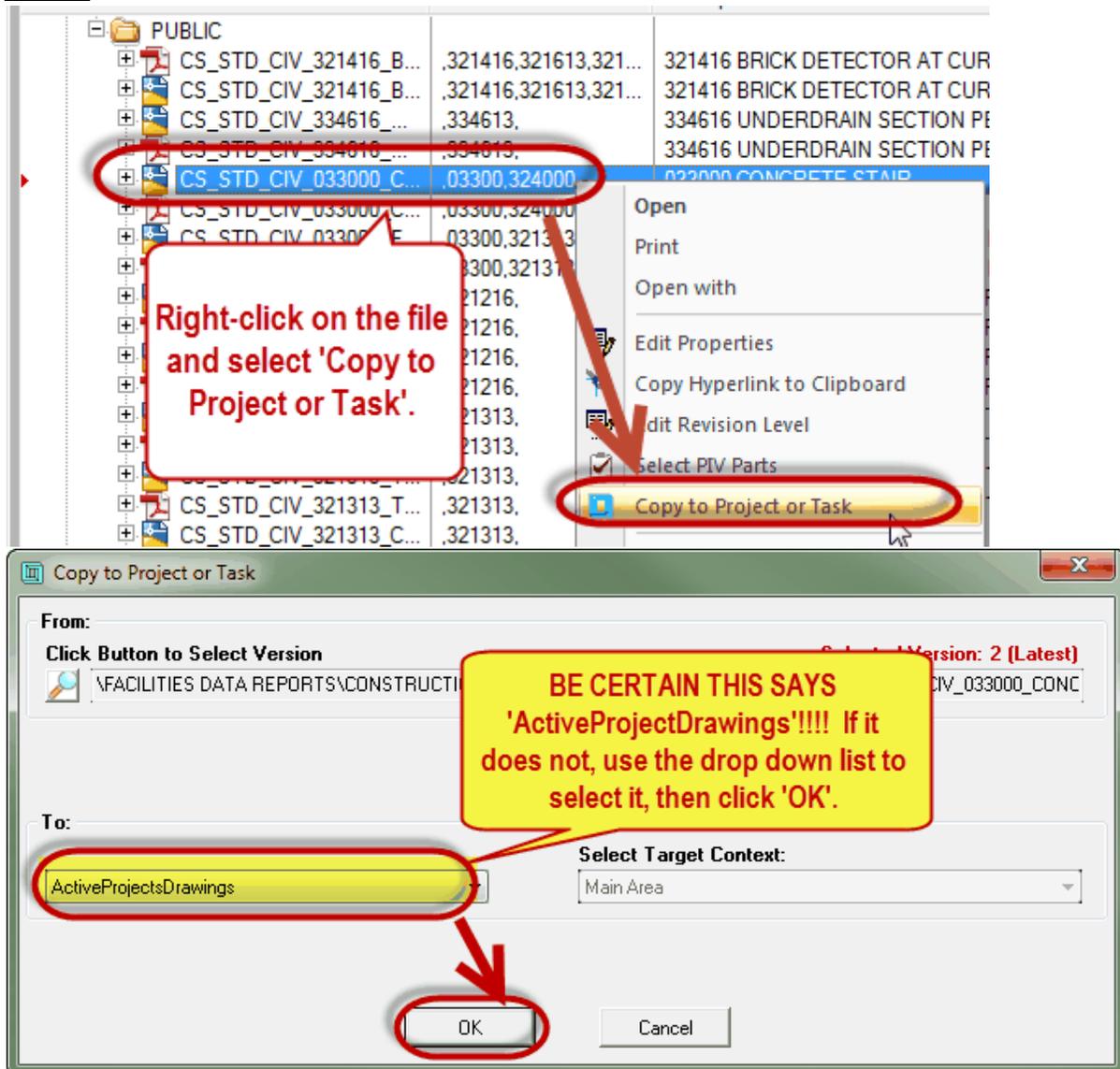
Use this method to add Construction Standard Details to Projects. This will ensure you are using the most current version of the EAS Construction Standard Details for your project.

To Begin, make sure you are in the Operational Vault.

#### 1. Navigate to the Construction Standard - Standard Details Nav View.



2. Find the Standard Detail you want to use for your Project (use the CAD file so it can be modified if needed), then select Copy to Project or Task.



### 3. Fill in the Wizard.

**Discipline**

**SubClass**

**Security Level** PB PUBLIC

**Floor(s)**

**Description** 033000 CONCRETE STAIR

**File Suffix** 033000 CONCRETE STAIR

**Originator**

**Source Company**

**Orig. FileName**

**MSJ File Name** 033000 CONCRETE STAIR

**Document Date** 12/17/2013

**Phase**

**File Name:**

Finish Cancel

**this is auto-populating from the standard details.**

Once you have clicked 'Finish', because you are in a different scope, Meridian will ask to switch to the 'Explorer' view in order to view the detail you just added to Projects.

BlueCielo Meridian Enterprise 2012S3 Office Client

'REC000001\_CIV\_DETAIL\_033000 CONCRETE STAIR.DWG' cannot be found in the current view. Select a different view where it appears.

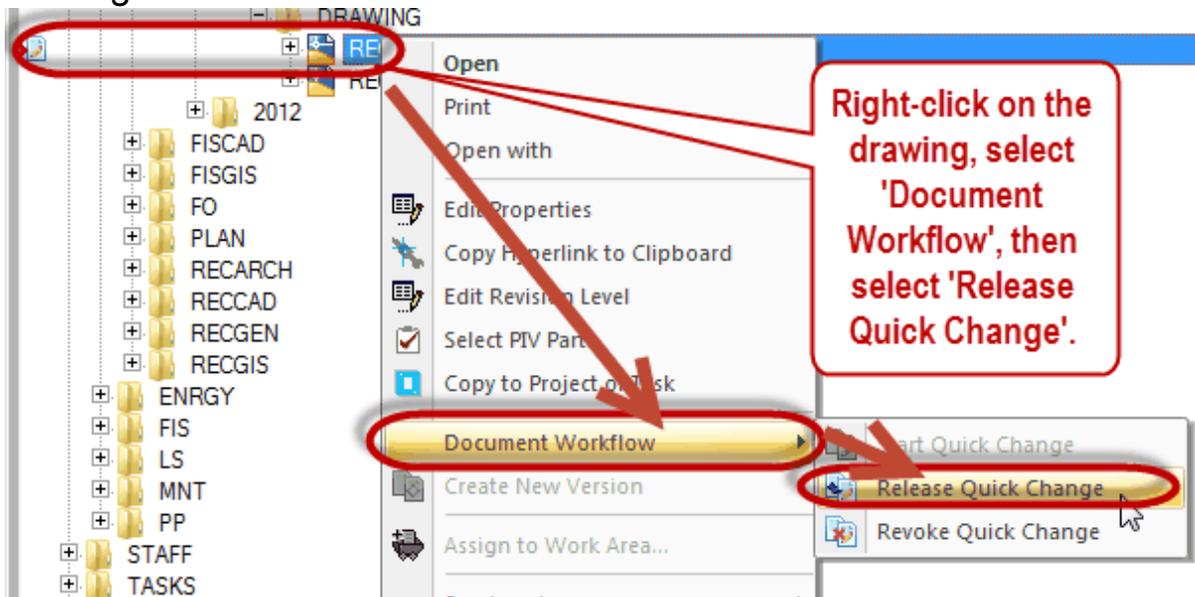
View: Explorer

**click 'OK'**

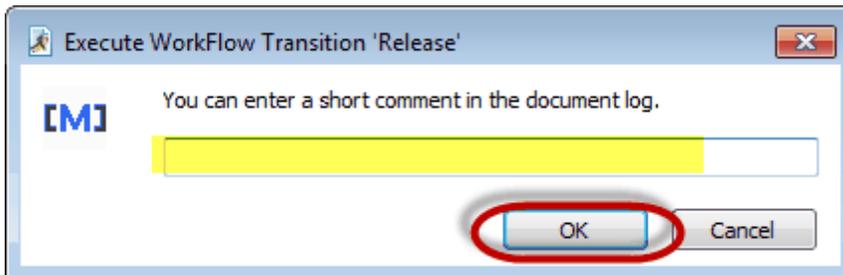
OK Cancel

4. Double click on the file to open and work on it.

5. Once you have finished working on the drawing (does not have to be completely finished, you might be done for the day), release the drawing.



Enter a comment and click 'OK'.



## 5.1.2.2.1 Exercise 11

## Using Construction Standard Details to add a drawing into Meridian

Please use Construction Standards - Standard Details to copy a standard detail to Projects.

**\* Use the same project number from exercise 4**

- Fill in the Wizard completely and click Finish.
- Remember to Release the Document!

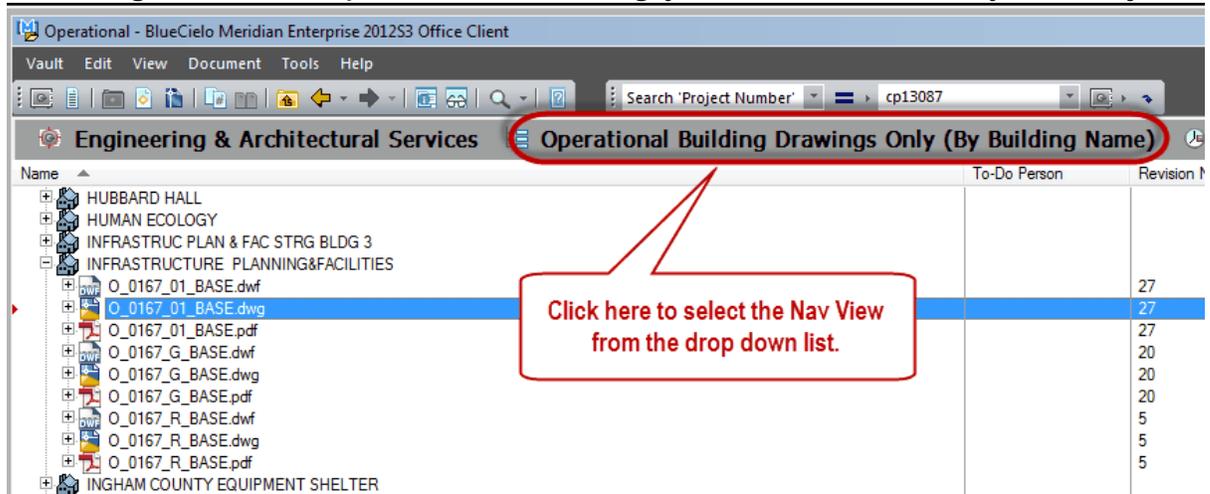
\*you will have 5 minutes\*

### 5.1.2.3 Operational Drawings

To use an Operational Drawing to add a drawing into Meridian, use this option. This will ensure you are using the most current version of the floor plans for your project.

To Begin, make sure you are in the Operational Vault.

1. Navigate to the Operational Drawing you want to use for your Project.



Name	To-Do Person	Revision
HUBBARD HALL		
HUMAN ECOLOGY		
INFRASTRUC PLAN & FAC STRG BLDG 3		
INFRASTRUCTURE PLANNING&FACILITIES		
O_0167_01_BASE.dwg		27
O_0167_01_BASE.dwg		27
O_0167_01_BASE.pdf		27
O_0167_G_BASE.dwg		20
O_0167_G_BASE.dwg		20
O_0167_G_BASE.pdf		20
O_0167_R_BASE.dwg		5
O_0167_R_BASE.dwg		5
O_0167_R_BASE.pdf		5
INGHAM COUNTY EQUIPMENT SHELTER		

2. Copy Operational Drawing to Projects by selecting Copy to Project or Task. 'Select ActiveProjectDrawings'.

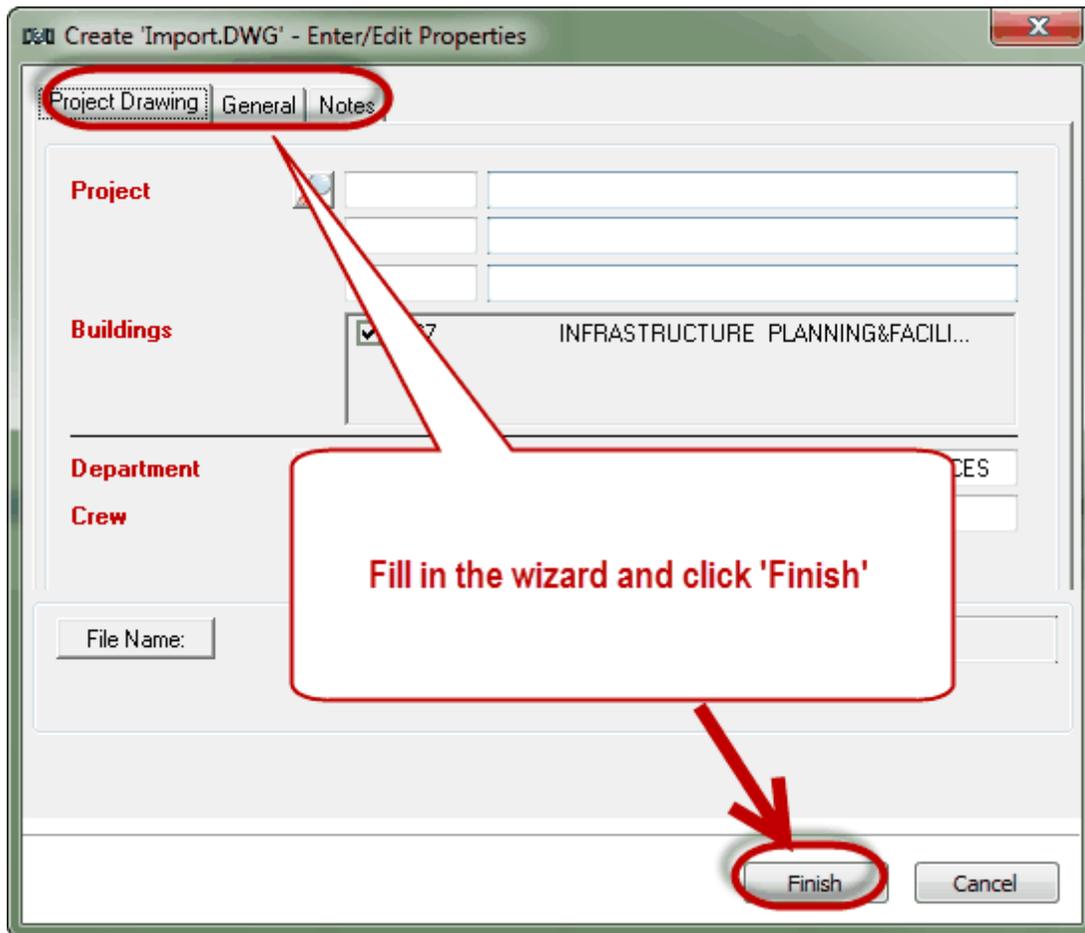
**Right-click and select 'Copy to Project or Task'.**

**If the files are 'locked for editing', you will not be able to use the 'Copy to Project or Task Feature'.**

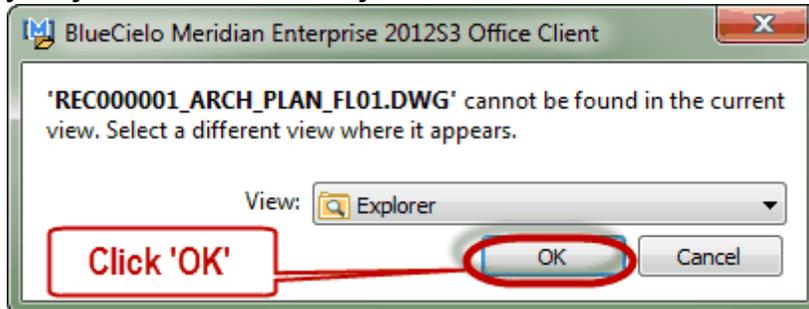
**BE CERTAIN THIS SAYS 'ActiveProjectDrawings'!!!! If it does not, use the drop down list to select it, then click 'OK'.**

**OK**

### 3. Fill in the wizard.

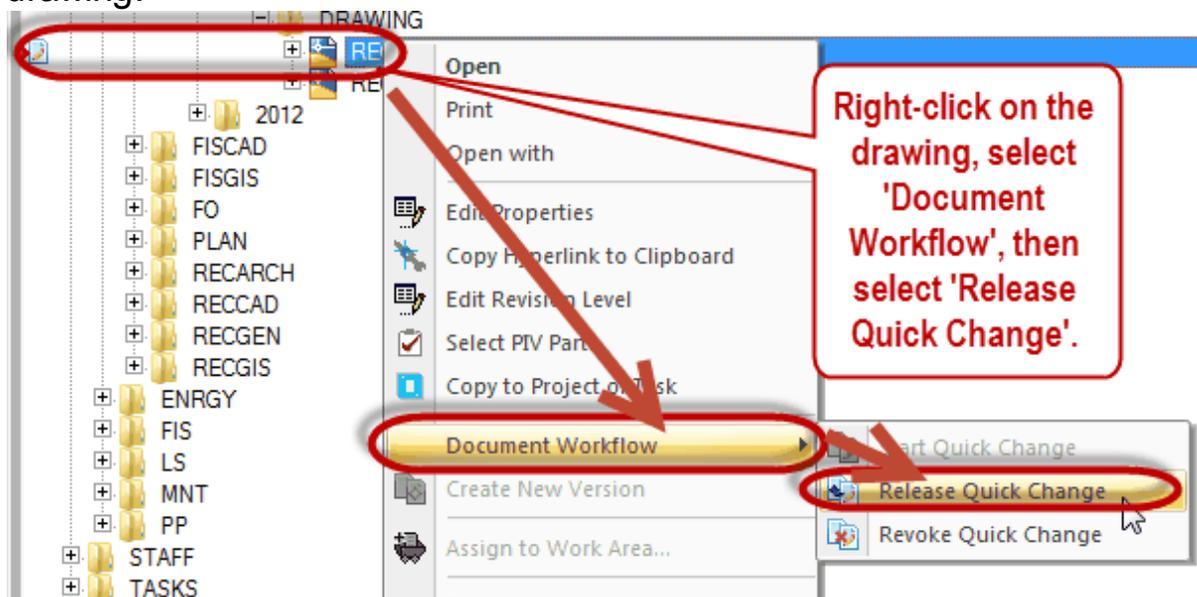


Once you have clicked 'Finish', because you are in a different scope, Meridian will ask to switch to the 'Explorer' view in order to view the file you just added to Projects.

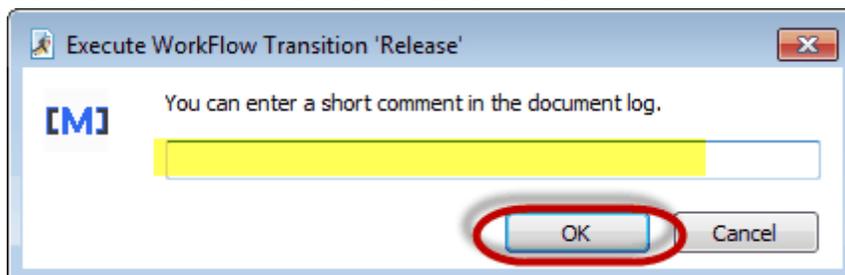


4. Double click on the file to open and work on it.

5. Once you have finished working on the drawing (does not have to be completely finished, you might be done for the day), release the drawing.



Enter a comment and click 'OK'.



## 5.1.2.3.1 Exercise 12

## Using Operational Drawings to add a drawing into Meridian

Please use Meridian Operational Drawings to copy a drawing to Meridian Projects.

- Find the Nav view to get to the operational drawing you want to use
- Fill in the Wizard completely and click Finish.

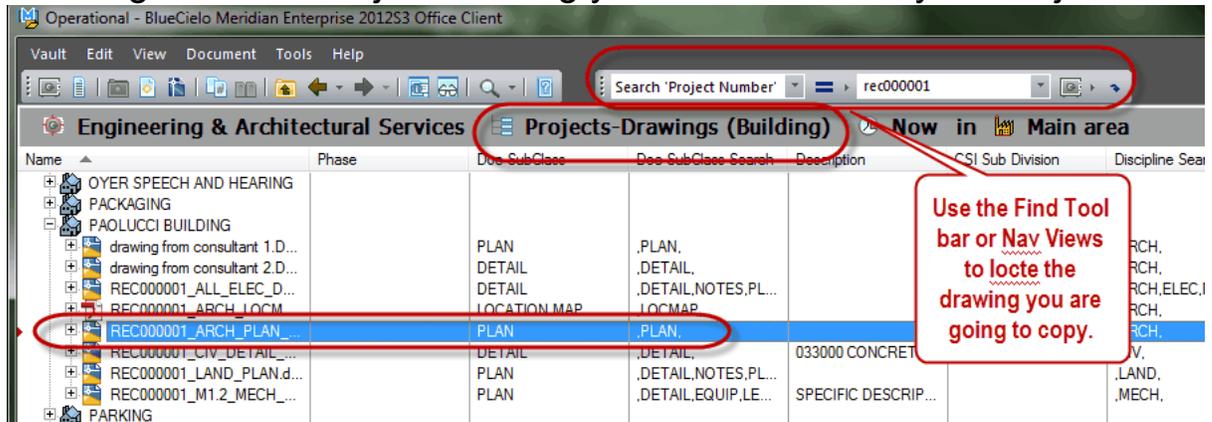
\*you will have 7 minutes\*

#### 5.1.2.4 Current Project Drawing

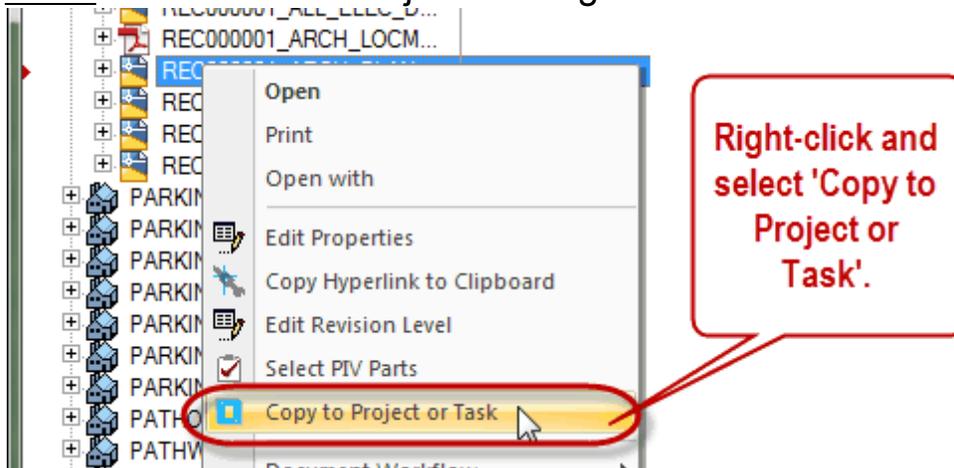
To use an Project Drawing from another project to add a drawing into Meridian, use this option.

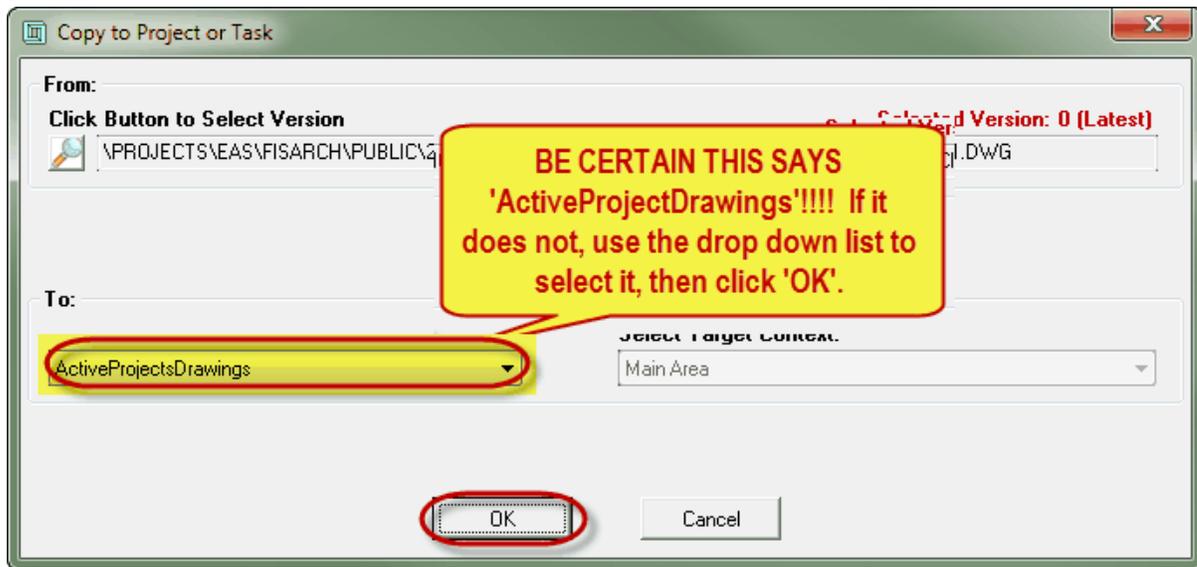
To Begin, make sure you are in the Operational Vault.

1. Navigate to the Project Drawing you want to use for your Project.

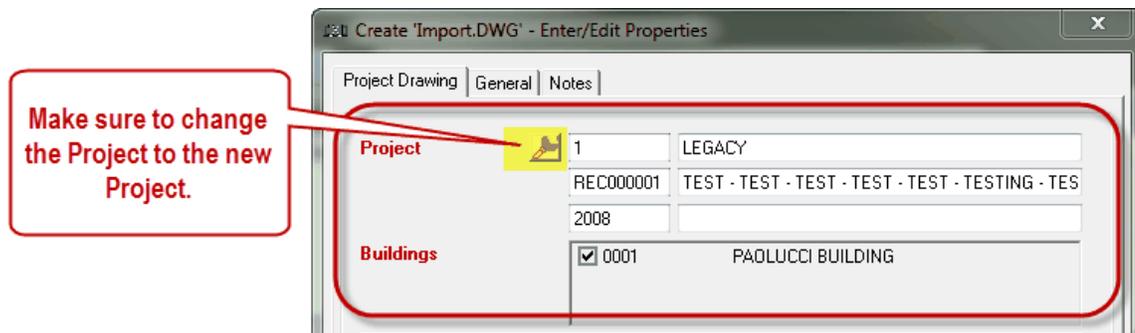


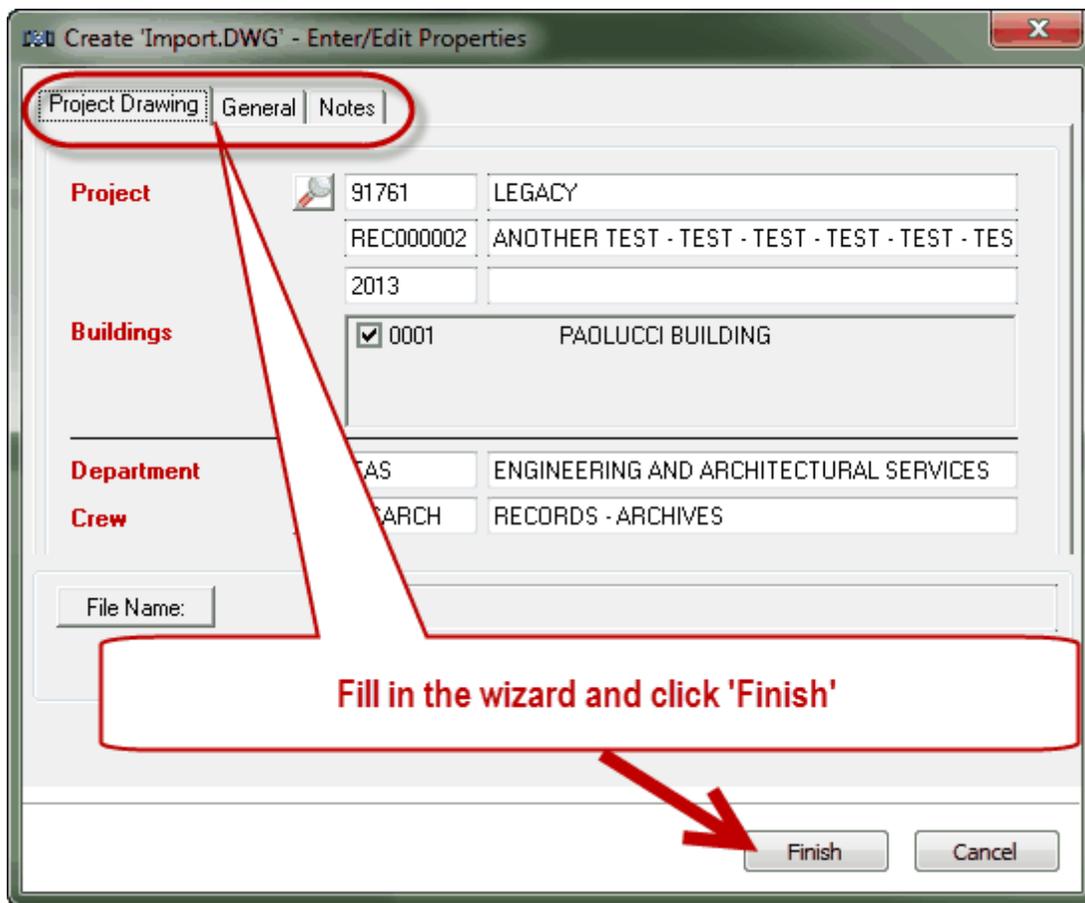
2. Copy the Project Drawing to Projects by selecting Copy to Project or Task. 'Select ActiveProjectDrawings'.





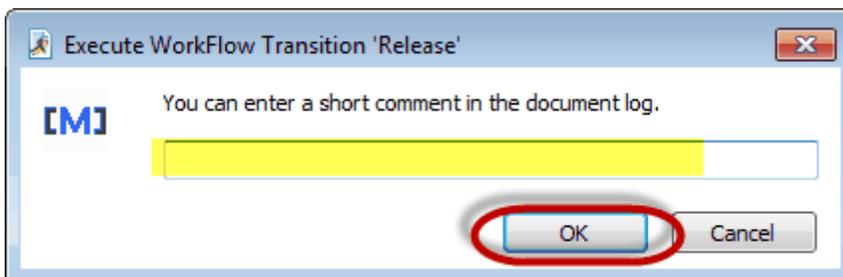
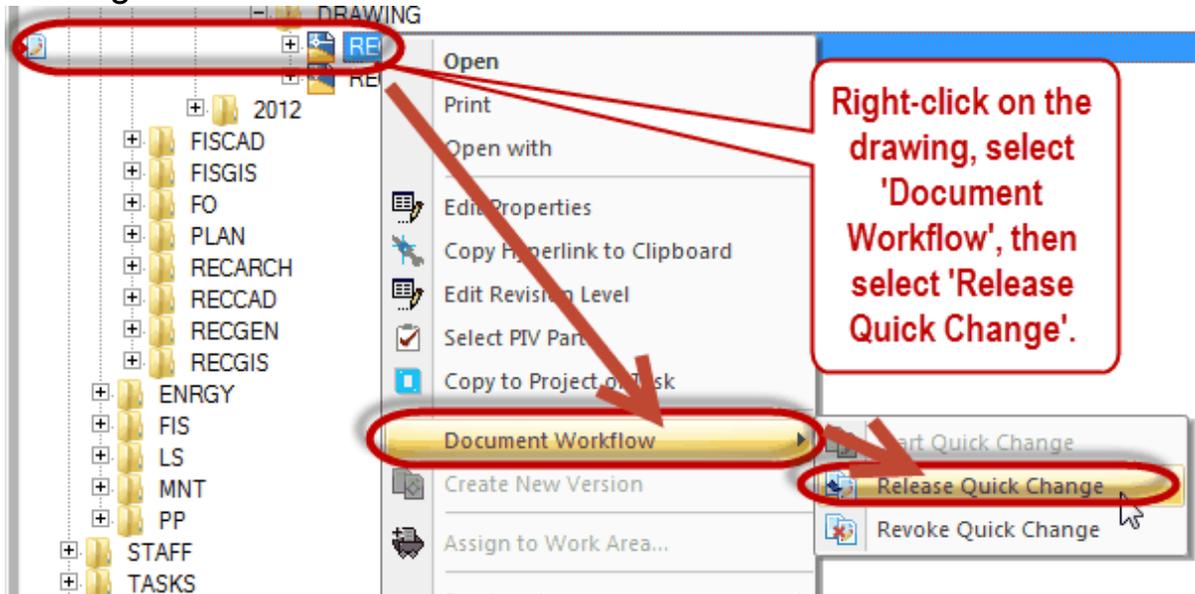
### 3. Fill in the wizard.





4. Double click on the file to open and work on it.

5. Once you have finished working on the drawing (does not have to be completely finished, you might be done for the day), release the drawing.



## 5.1.2.4.1 Exercise 13

## Using a Project Drawing to add a drawing into Meridian

Please use a Project Drawing currently stored in Meridian Projects to copy a drawing to Meridian Projects.

- Find the Nav view to get to the project drawing you want to use
- Fill in the Wizard completely and click Finish.

\*you will have 7 minutes\*

## 5.2 Modifying Drawings

Modifying drawings is used to update or replace the current drawing in Meridian.

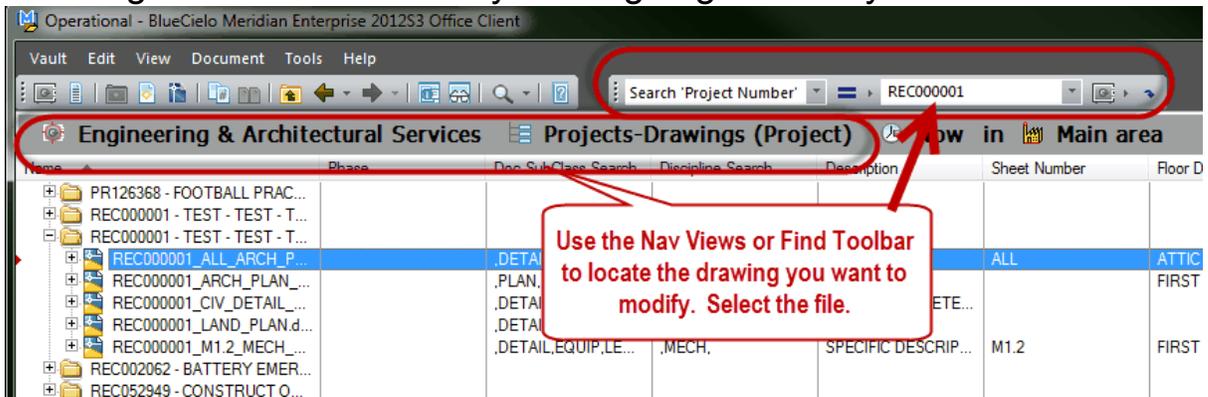
Based on whether it is an internal or external document, you will either open and modify the drawing content or replace the drawing content completely with a new file.

- Internal Drawings will most likely be modified by our staff and therefore you will open the file for editing and make changes and save them within Meridian.
- External Drawings will most likely have been received from an outside source and therefore are already updated. They will need to be added to Meridian by replacing the current drawings.

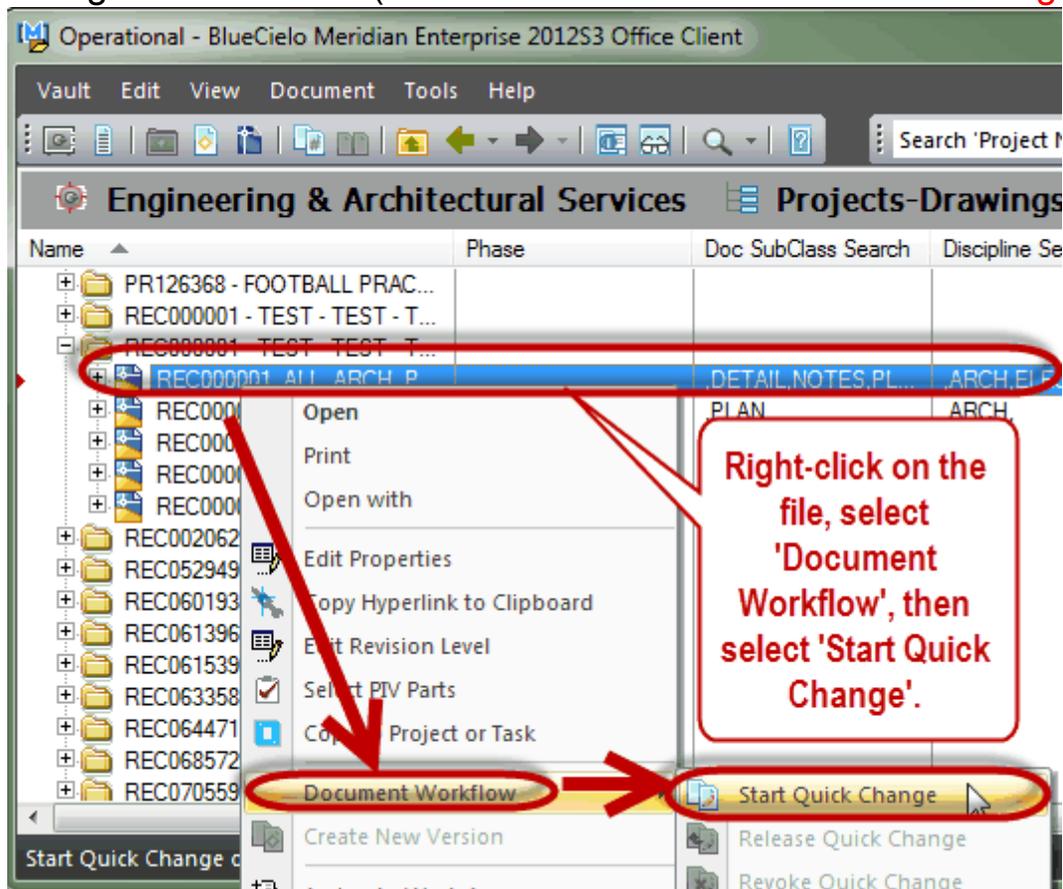
**\*\*\*Modifying the Drawing does NOT change the indexing information about that drawing. It only changes the drawing content.\*\*\***

## To Start a Quick Change:

1. Navigate to the document you are going to modify and select it.



2. Start the Quick Change by either:
  - A. Right-click method (use for either external or internal drawings)

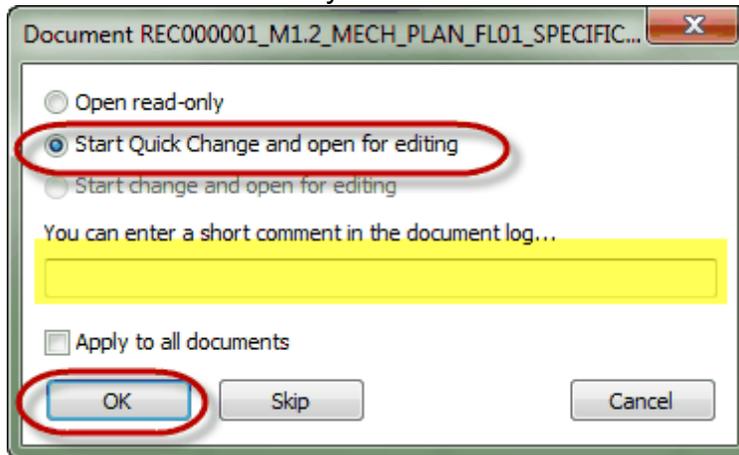




## To Make Modifications:

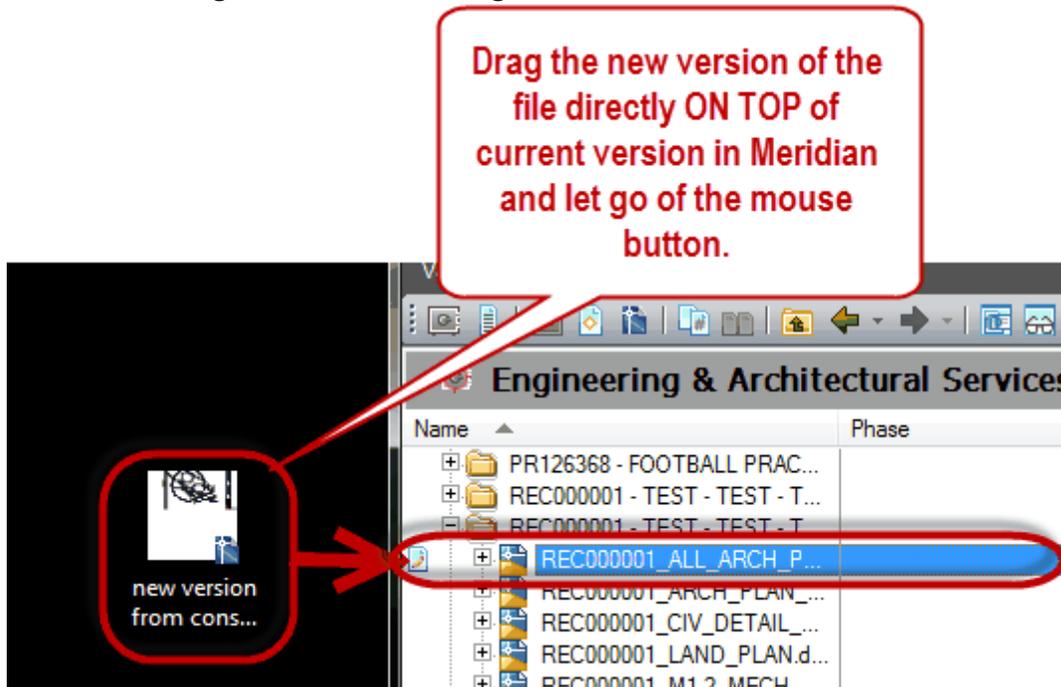
### 1. If **Internal Drawing:**

- a. Double-click and 'Start Quick Change and open for editing', Make any changes, 'Save' the drawing then 'close' the drawing.
  - When you save, you should NOT have to pick the location, it should automatically save into the correct location in Meridian.

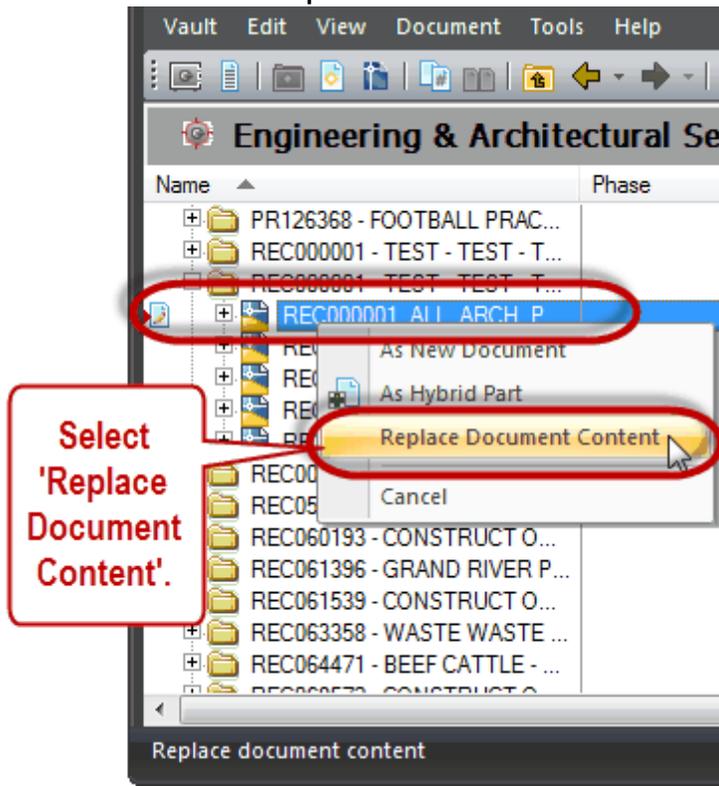


### 2. If **External Drawing:**

- a. Drag the new drawing into Meridian ON TOP of current drawing

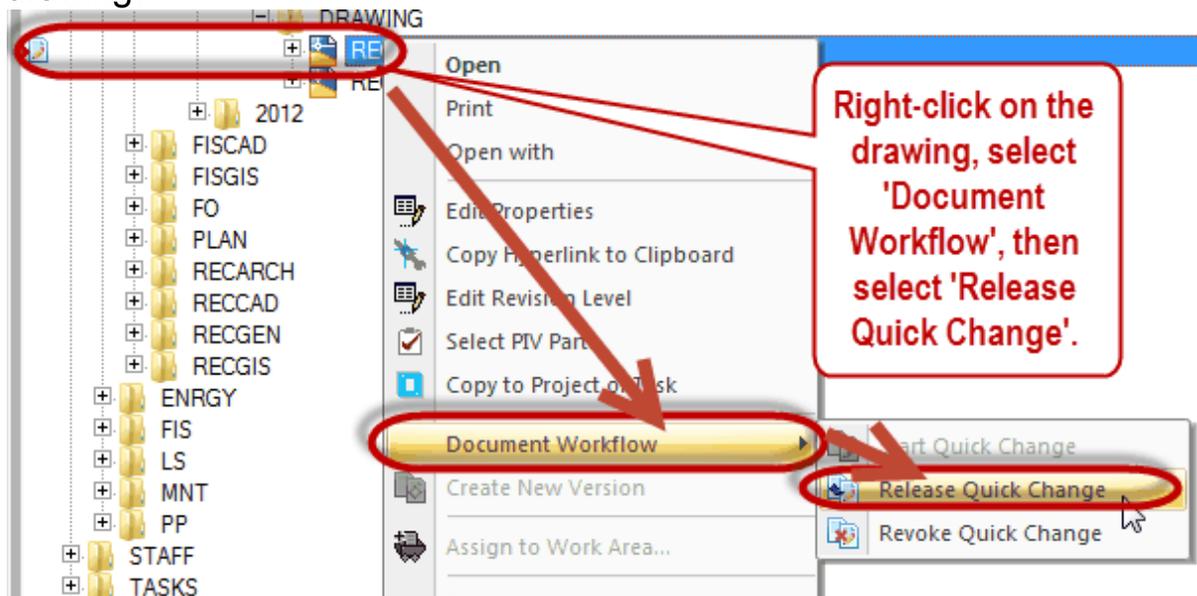


b. Select 'Replace Document Content'

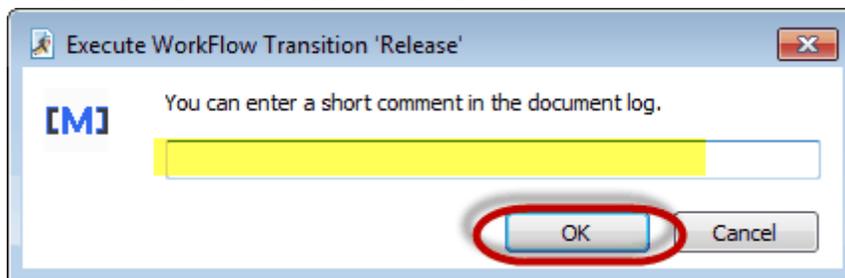


### **Release the Quick Change:**

3. Once you have finished working on the drawing (does not have to be completely finished, you might be done for the day), release the drawing.



Enter a comment and click 'OK'.



### 5.2.1 Exercise 14

## Modifying drawings in Meridian Projects

1. Choose one of the internal Project Drawings you added in earlier exercises to modify.

- Start a Quick Change and open the drawing for editing.
- Modify the drawing and save the changes.
- Release the Quick Change.

2. Choose an external Project Drawing you added earlier to modify.

- Start a Quick Change.
- Replace the document content. (for this exercise, you can either find a different file on your computer or copy this one out and drag it right back in)
- Release the Quick Change.

\*you will have 10 minutes\*

### 5.3 Editing Drawing Properties

Edit Properties is used to make changes to the indexed information for the drawing in Meridian.

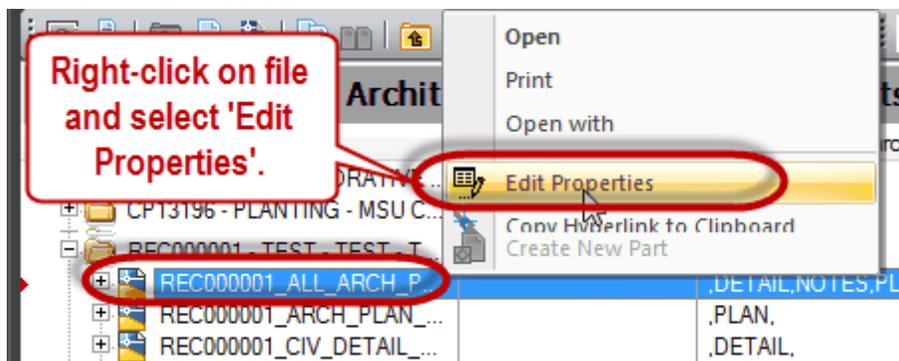
You will use the Wizard to Edit Properties.

**\*\*\*Editing properties does NOT change the drawing content, only the indexed information.\*\*\***

Depending on what fields you edit and whether or not it is an internal or external drawing, the filename may change.

#### To Edit Properties:

1. Find the drawing in Meridian.
2. Right-Click on the drawing you would like to change the information about in Meridian.



3. The Wizard will come up, replace any information you need to change.

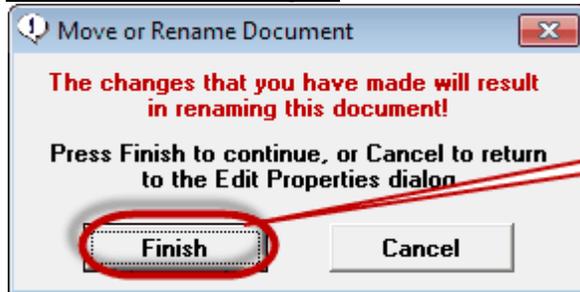
current name

Change any properties that need to be edited, then click 'Finish'.

new name

Certain indexing properties affect the filename. If you changed one that does, you will get the following messages.

### **Filename Change:**



click 'Finish'

---

**5.3.1 Exercise 15****Editing Properties in Meridian Projects**

1. Choose one of the Project Drawings you just modified and edit the properties.

\*you will have 3 minutes\*

## 5.4 Xrefs

- Meridian will create a Meridian References for X-refs as long as **ALL** the files are stored in Meridian.
- Once the Meridian References are created, those files will continually be linked to each other.
- Meridian will store each revision in the 'Revision History'. It will link the documents real time and also store them as they were at the time of each revision.
- You can change the editing properties, content of the drawing, filename, etc. and as long as the reference has been created between the drawings, they will stay connected.
- Users should not add 'zipped' or 'compressed' files to Meridian because they are not able to be used as references.
- When adding external files, add 'child' files first, then add the 'parent' file and use the 'Synchronize' option to tell Meridian to detect the xrefs and link all the files together. If the files are in different folders, you will have to open the 'Parent' file in Autocad and save it.
- Never modify the filename manually or you will break any xrefs.
- You can only xref files that are in the same vault in Meridian.
- Whenever the reference files are updated (throughout the entire lifespan of the file), your drawing will update to reflect those changes. Only in the version history of the file will you be able to see the previous versions of the xref used. This may or may not be something you want in your particular file. You decide.
- **The following are 5 scenarios you may experience when working with drawings that have xrefs:**
  1. Both Parent file & Child file are in Meridian
  2. Parent file is in Meridian, Child file is not
  3. Parent file is not in Meridian, Child file is
  4. Neither Parent file nor Child file are in Meridian
  5. Managing drawings received from an External Source

**No matter what, for xrefs to work... ALL files have to be in Meridian so the Meridian Reference can be created and maintained by Meridian.**

### 5.4.1 Parent-Child Relationship

**Parent** file - any drawing that references another drawing.

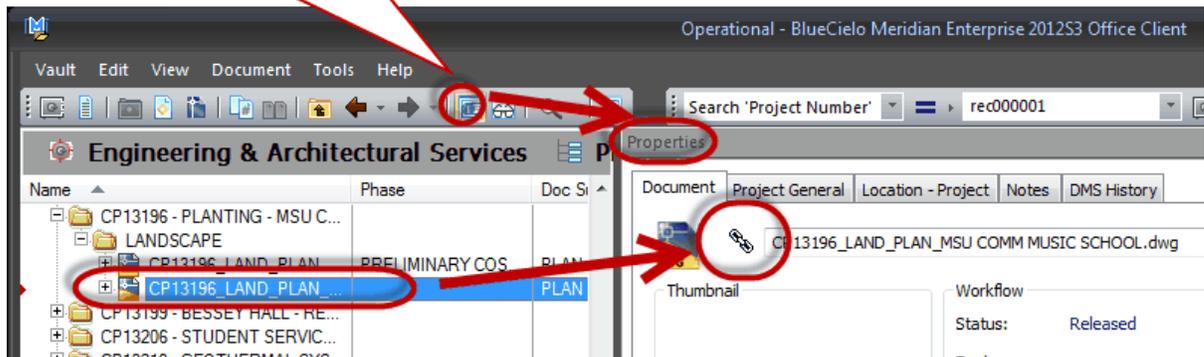
**Child** file - any drawing that is referenced by another drawing.

It is possible that a drawing may be a 'Child' and a 'Parent' at the same time.

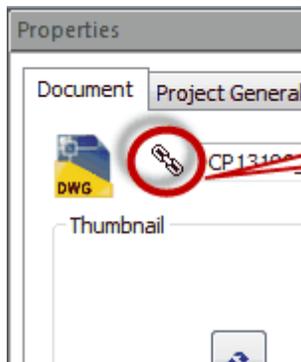
When drawings are stored in Meridian that have references to other drawings, Meridian will create 'Meridian references' between the drawings.

Drawings that have references will have a link symbol next to the thumbnail on the properties tab.

to see if a drawing has any references associated with it, turn on the properties pane. Select a file and if there is a chain link icon next to the filename field, there is a Meridian Reference.

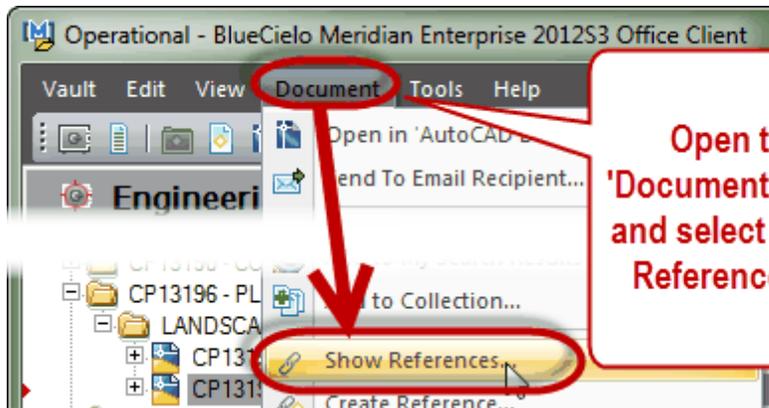


Click the chain icon to see the references for this document or select 'Show References' in the Document menu.



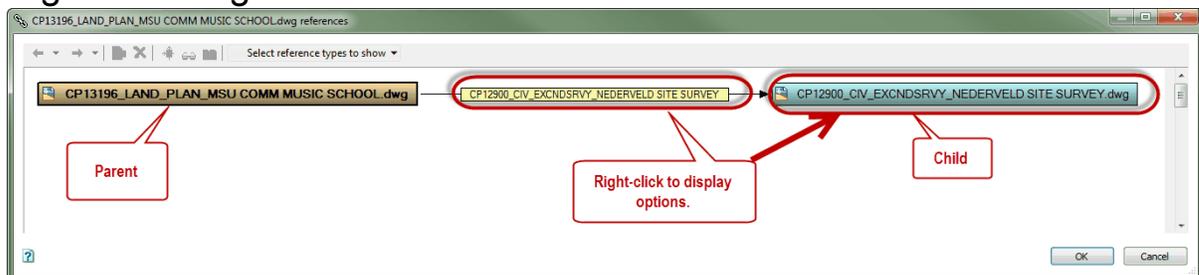
Click on the chain icon.

or



Open the 'Document' menu and select 'Show References...'

Right-click to go to the referenced file



Parent

Right-click to display options.

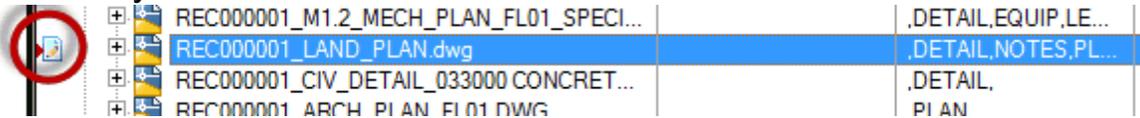
Child

#### 5.4.2 Option 1 - Both Parent & Child are in Meridian

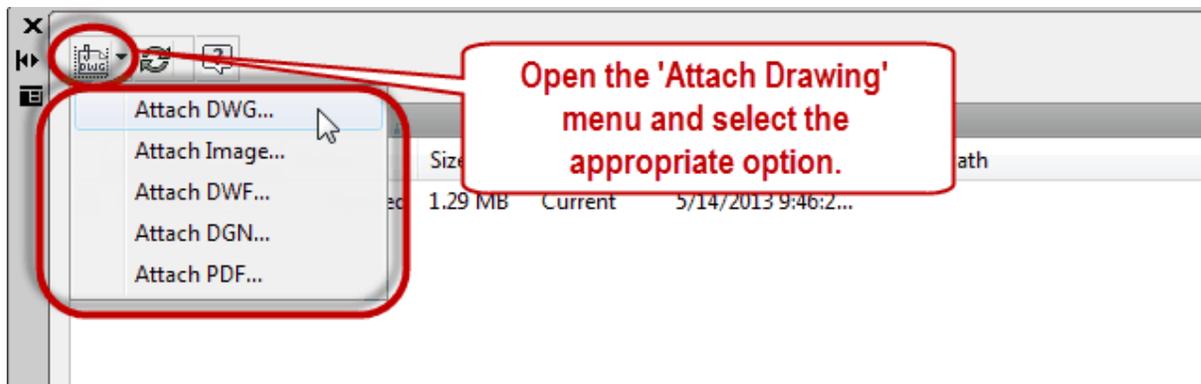
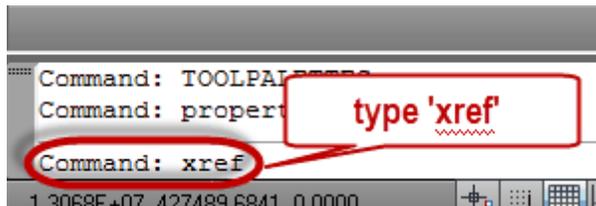
**Scenario:** You have a drawing which is in Meridian and you want to xref another drawing which is also in Meridian.

#### Steps

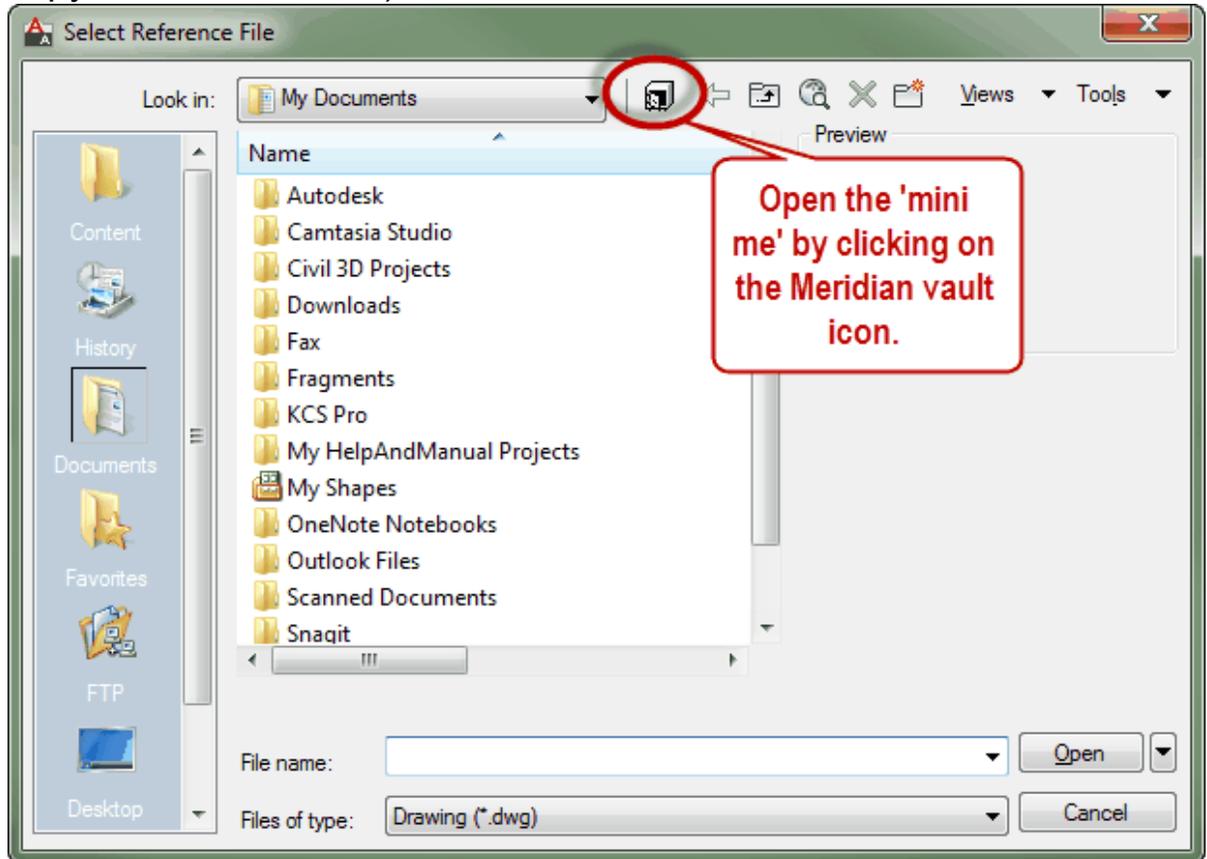
1. 'Start a Quick Change' and open the parent drawing if you have not already done so.



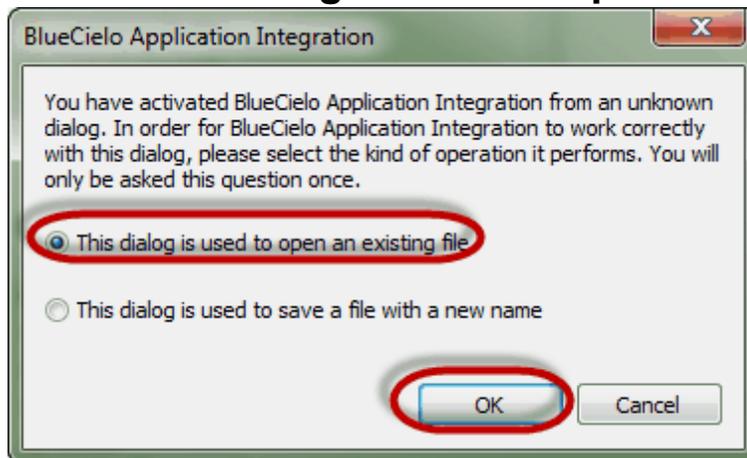
2. In Autocad, use the the xref command (Ctrl+9 to show command line if hidden) to open up the xref task pane, Click the 'Attach DWG' button



3. Open the 'Mini Me' by clicking on the Meridian Vault icon (Mini Me grants access to files in Meridian without having to open Meridian and copy out the file to use).



4. If you see this dialog... Make sure you choose the option titled 'This dialog is used to open an existing file'



5. Now use standard Meridian navigation techniques to find the file you want to reference.

The screenshot shows the Meridian software interface with several annotations in red and blue. A blue box highlights the 'Commissioning Services' and 'Explorer' tabs. A red box highlights the 'Search Project Number' dropdown menu, which contains the text 'rec000001'. A red callout bubble points to the 'Commissioning Services' tab with the text 'select the correct 'Scope''. Another red callout bubble points to the 'Explorer' tab with the text 'select an appropriate 'Nav View''. A third red callout bubble points to the search dropdown with the text 'enter the searching criteria and hit 'enter' on your keyboard.'. A blue callout bubble at the bottom points to the search area with the text 'searching option 1 OR option 2'.

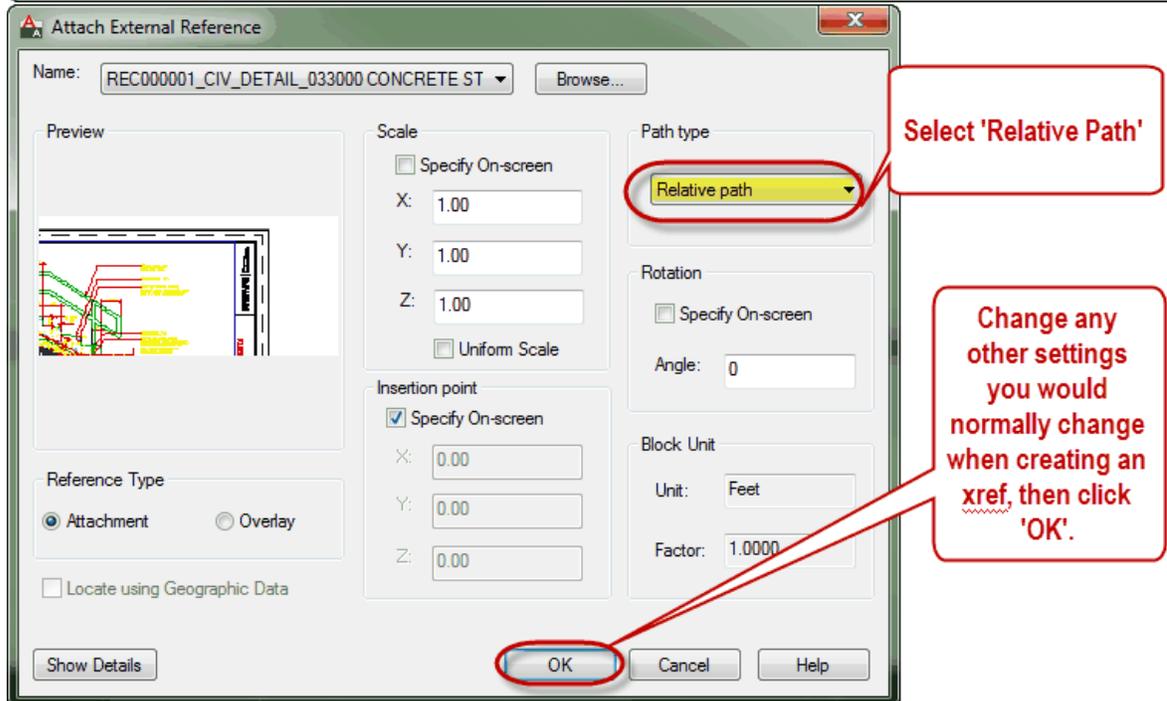
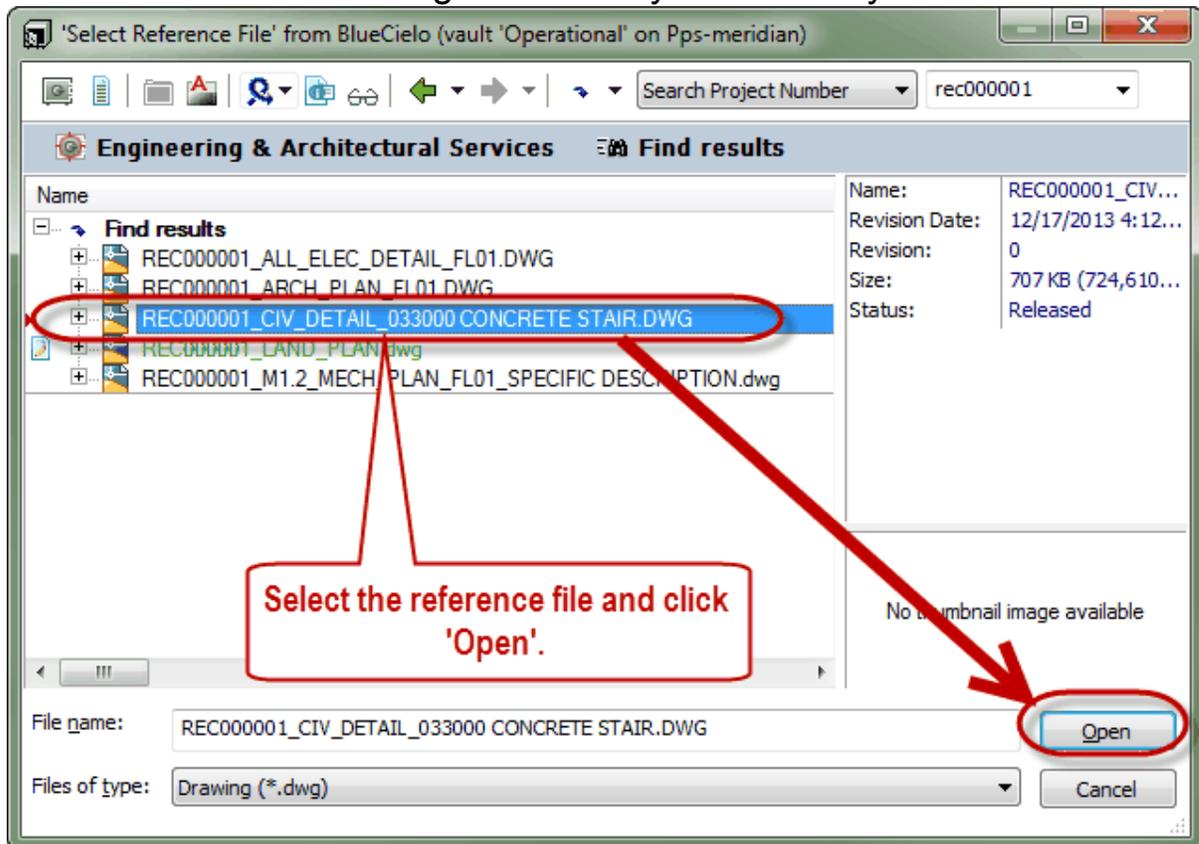
select the correct 'Scope'.

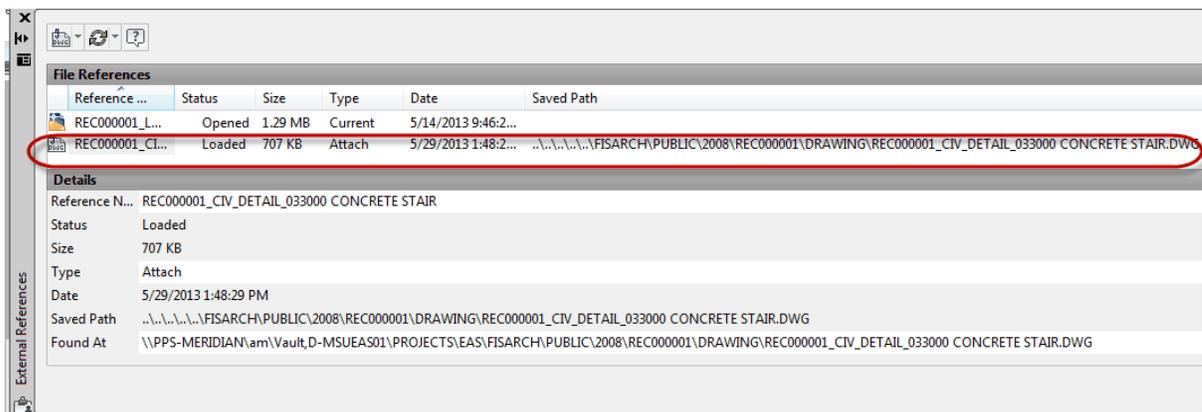
select an appropriate 'Nav View'.

enter the searching criteria and hit 'enter' on your keyboard.

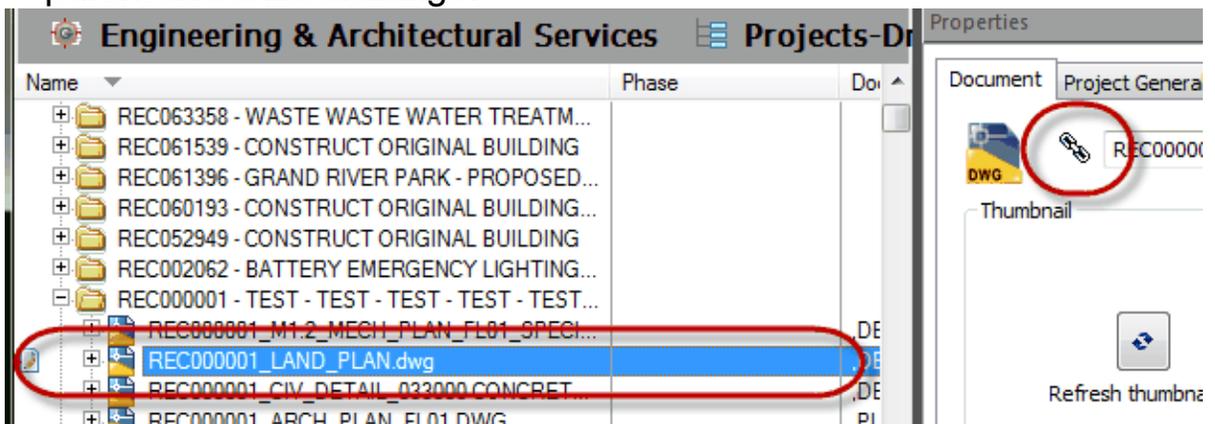
searching option 1 OR option 2

5. Once the file you want to reference is selected, click the 'Open' button and continue adding the xref as you would any other xref.





6. When you save the drawing and close it, the Meridian integration will detect the xref and create Meridian references between both the parent and child drawings.



Now 'Release' the Quick Change to the drawing.

## 5.4.2.1 Exercise 16

## Create a Meridian Reference (both files are in Meridian already)

Please xref two of the drawings you added earlier.

\* The drawings may not make sense to be referenced together, but this is more about the Meridian functionality than making a usable drawing.

- Remember to Start Quick Change first.
- Open file in Autocad and create the xref (remember to use MINI-ME)
- Save and close the drawing
- Release the Quick Change.
- The Properties on the files should now show the 'reference' icon

\*you will have 7 minutes\*

#### 5.4.3 Option 2 - Parent is in Meridian, Child is Not.

**Scenario:** You need to xref a drawing which is not yet in Meridian from a drawing which is in Meridian.

In this scenario, you should first add the drawing you are trying to xref (i.e. the 'child') to Meridian and then follow the steps outline in [Option 1 - Both Parent & Child are in Meridian](#)

## 5.4.3.1 Exercise 17

## Create a Meridian Reference (only parent file is in Meridian)

Please add a file you will want to reference, then xref it to one of the drawings you referenced in Exercise 18.

\* The drawings may not make sense to be referenced together, but this is more about the Meridian functionality than making a usable drawing.

- Add a dwg file and Release the Quick Change
- Then, 'Start Quick Change' on the 'Parent' file.
- Open file in Autocad and create the xref (remember to use MINI-ME)
- Save and close the drawing
- Release the Quick Change.
- The Properties on the files should now show the 'reference' icon

\*you will have 7 minutes\*

#### 5.4.4 Option 3 - Parent is not in Meridian, Child is

**Scenario:** You have a drawing which is not in Meridian and you need to xref another drawing which is already in Meridain.

In this scenario, you should first add the drawing you are want to add the xref to (i.e. the 'parent') and then follow the steps outline in [Option 1 - Both Parent & Child are in Meridian](#)

## 5.4.4.1 Exercise 18

## Create a Meridian Reference (only child file is in Meridian)

Please create a new drawing, then xref one of the drawings from Exercise 18.

\* The drawings may not make sense to be referenced together, but this is more about the Meridian functionality than making a usable drawing.

- Create a new dwg file (index, then double click to open it, draw a circle or square).
- Create the xref (remember to use MINI-ME)
- Save and close the drawing
- Release the Quick Change.
- The Properties on the files should now show the 'reference' icon

\*you will have 7 minutes\*

#### 5.4.5 Option 4 - Internal - Neither Parent nor Child are in Meridian.

**Scenario:** You have two drawings, neither of which are Meridian. You want to xref one of these drawings from the other drawing..

In this scenario, you should first add the the 'child' drawing into Meridian and then add the 'parent' drawing to Meridian and then follow the steps outline in [Option 1 - Both Parent & Child are in Meridian](#)

## 5.4.5.1 Exercise 19

## Create a Meridian Reference (neither parent nor child file is in Meridian)

Please create two new drawings, then xref them to each other.

\* The drawings may not make sense to be referenced together, but this is more about the Meridian functionality than making a usable drawing.

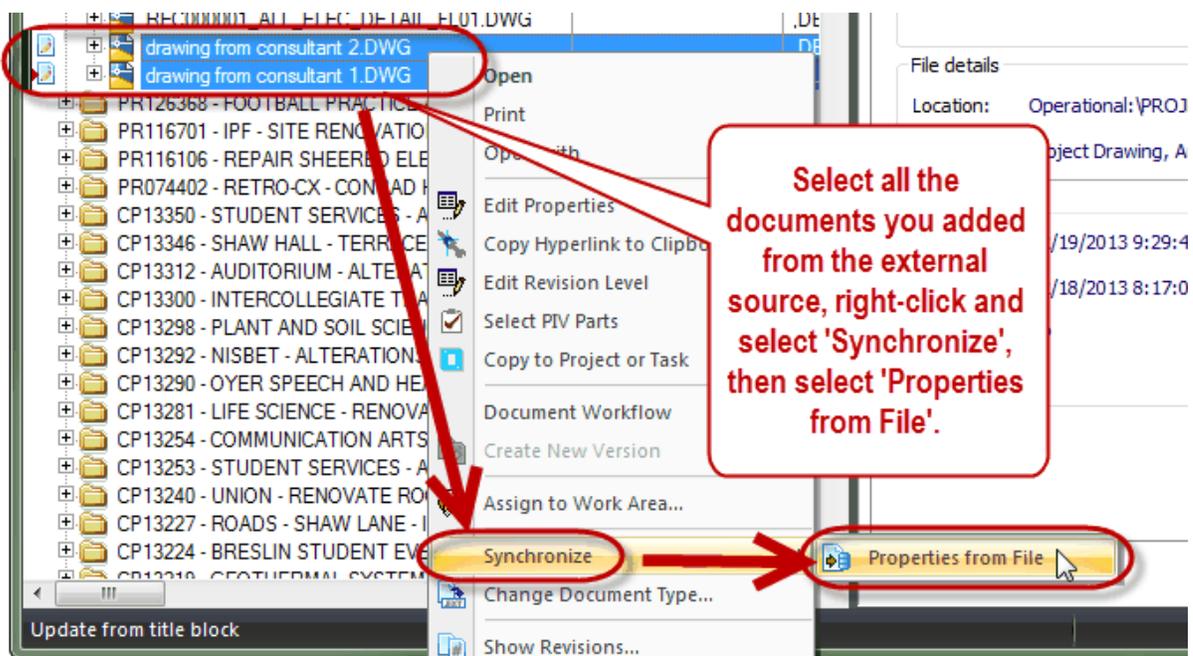
- Create a new dwg file (index, open, draw a square, save, close release the document).
- Create a new dwg file (index, then double click to open it, draw a circle).
- Create the xref to the drawing you created in step one (remember to use MINI-ME)
- Save and close the drawing
- Release the Quick Change.
- The Properties on the files should now show the 'reference' icon

\*you will have 7 minutes\*

#### 5.4.6 Option 5 - External - Neither Parent nor Child are in Meridian.

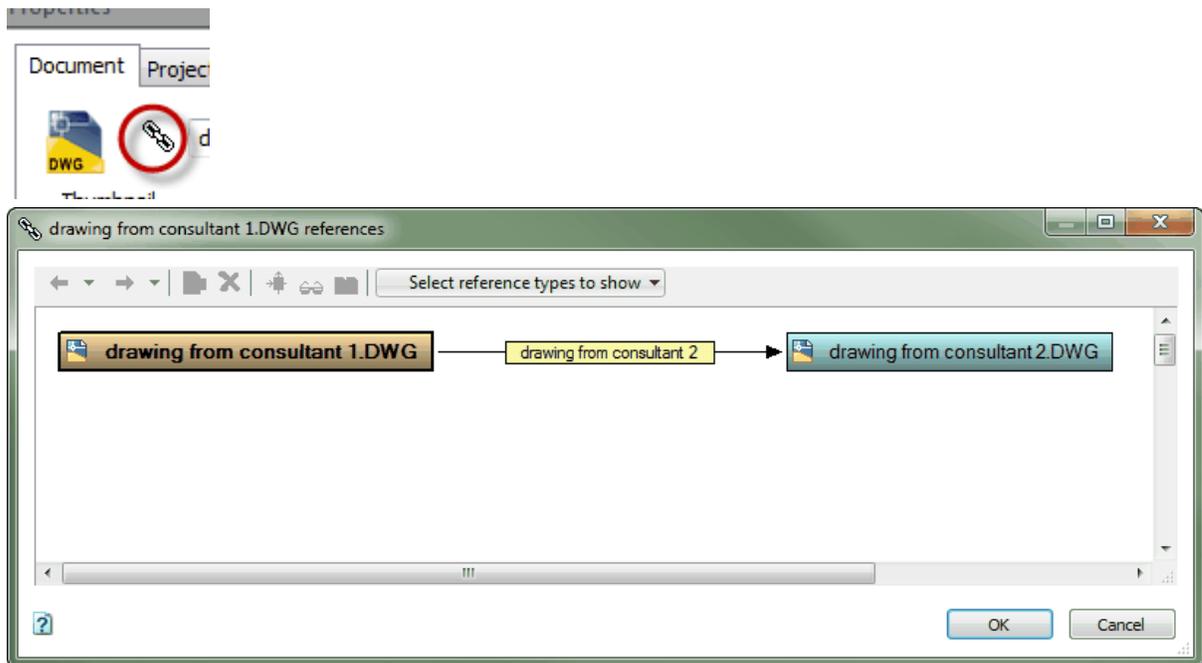
**External Source - Adding - Scenario A:** You have received a batch of drawings from an External source to add to Meridian. You want to ensure any references stay in tact and Meridian will build the Meridian references.

1. Follow the steps outlined in [Adding Drawings](#) section (If drawings are on a local drive, make sure to 'Delete Source')
2. Select the drawings you have just added (they will still need to be 'Under Quick Change')
3. **Synchronize properties from files** by right clicking and using the **Synchronize --> Properties from File** option.



Meridian will examine each file and build Meridian references from all CAD external references it finds in the selected documents.

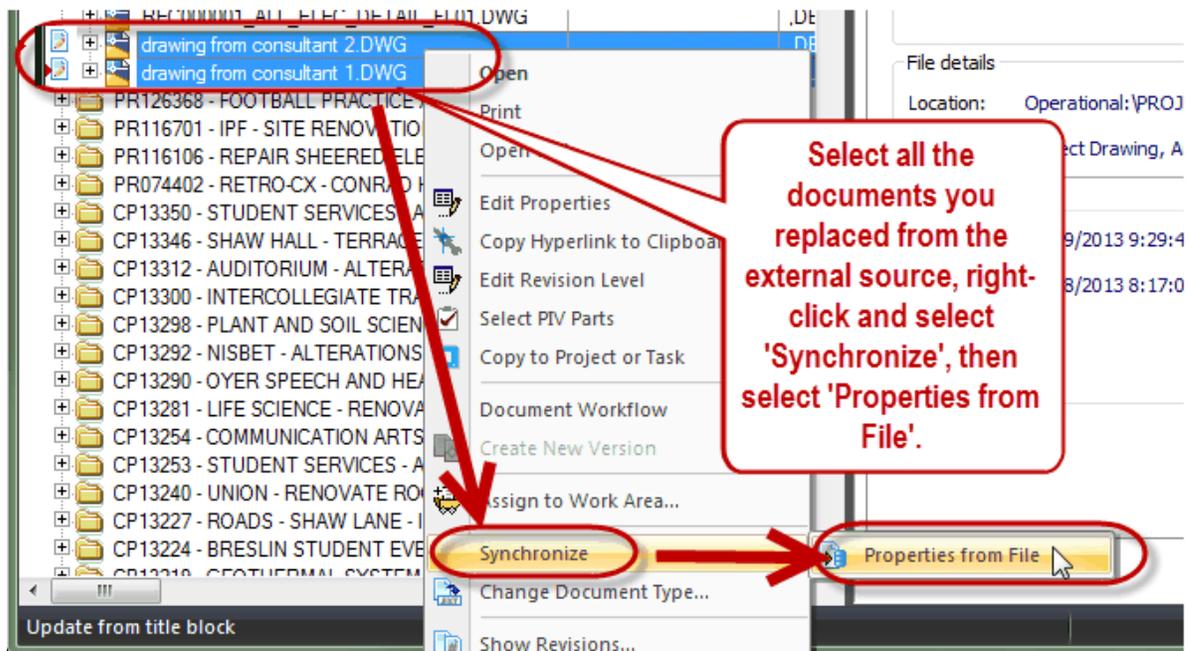
Make sure Reference Icon appears or the references are created!!!!



If it is, then you can 'Release' the drawings.

**External Source - Updating - Scenario B:** You have received updates to one or more drawings you have already received and previously added to Meridian. You want to ensure any references stay in tact and Meridian will build the Meridian references.

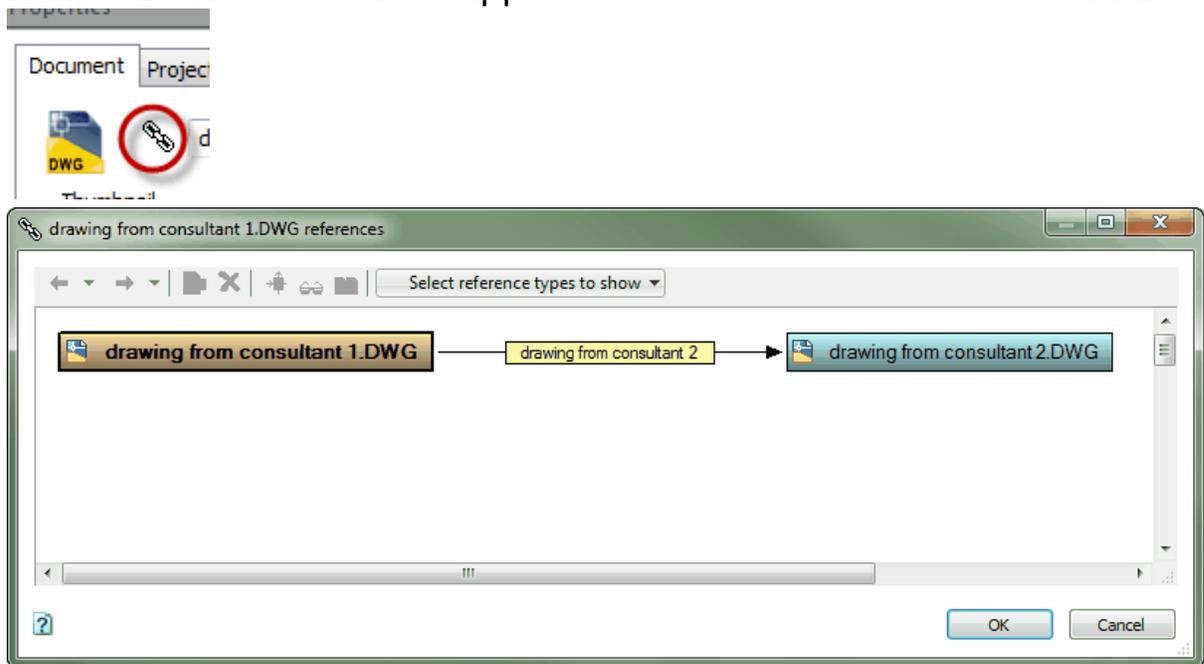
1. Follow the steps outlined in the [Modifying Drawings - external source](#) section (If drawings are on a local drive, make sure to 'Delete Source')
2. Replace the document content in Meridian with the updated files **ONE AT A TIME!**
3. Select the files you modified and **Synchronize properties from files** by right clicking and using the **Synchronize --> Properties from File** option.



or, 'Open' the Parent File in AutoCAD and 'save'. This will change the path of the document to be a 'relative path' (and create the Meridian Reference) instead of looking for the drive the originator saved the files on originally.

Meridian will examine each file and build Meridian references from all CAD external references it finds in the selected documents.

Make sure Reference Icon appears or the references are created!!!!



If it is, then you can 'Release' the drawings.

## 5.4.6.1 Exercise 20

## Add drawings that have already been externally referenced by a consultant

Scenario A: Add 2 drawings that have already been externally referenced.

\* Navigate to the H:\drive and the folder called MERIDIAN PROJECTS TRAINING TEST FILES and then choose the 'adding' folder.

(H:\MERIDIAN PROJECTS TRAINING TEST FILES  
\SESSION...\adding)

- Select a set (when adding, you can select multiple files at once)
- Add child file
- Add parent file
- Highlight and Synchronize the files
- Save and close the drawing
- Release the Quick Change.
- The Properties on the files should now show the 'reference' icon

\*you will have 5 minutes\*

## 5.4.6.2 Exercise 21

## Modify drawings that have already been externally referenced by a consultant

Scenario B: Modify 2 drawings that have already been externally referenced.

\* Navigate to the H:\drive and the folder called MERIDIAN PROJECTS TRAINING TEST FILES and then choose the 'modifying' folder.

(H:\MERIDIAN PROJECTS TRAINING TEST FILES  
\SESSION...\modifying)

- In Meridian, Create Quick Change of both parent and child drawings.
- Select new child file and drag & drop on top of child file in Meridian.
- Replace document content
- Select new parent file and drag & drop on top of parent file in Meridian.
- Replace document content
- If the new versions aren't showing up, highlight and Synchronize the files
- Save and close the drawing
- Release the drawings
- The Properties on the files should now show the 'reference' icon, make sure the viewer shows the updated drawings.

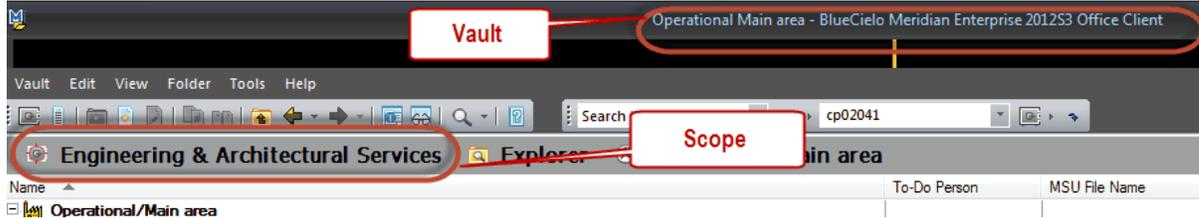
\*you will have 5 minutes\*

## 6 Project Drawing Set

### Overview:

The 'Project Drawing Set' should be used for a complete pdf file that consists of all the sheets for that phase of the project (ie. bid set, addendum, DD 95% review, CD, SD, etc). In some cases you may be responsible for only one discipline and in that instance, you could add ALL the sheets for that discipline for that phase of the project (ie. bid set - mechanical, addendum - structural, DD 95% review - architectural, etc.).

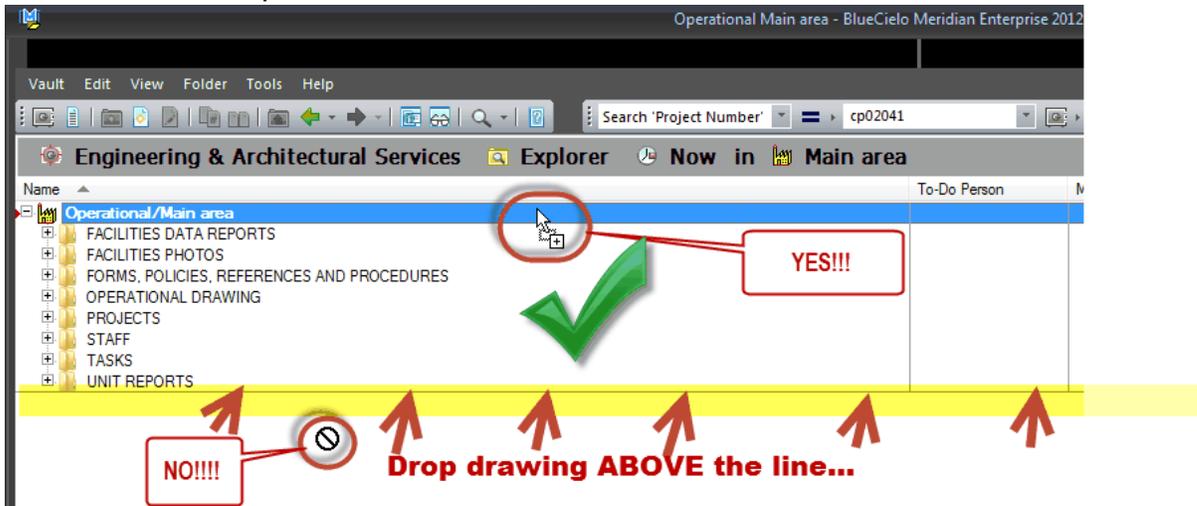
To Begin, make sure you are in the Operational Vault and Scope that best describes which Department or Crew you work for.



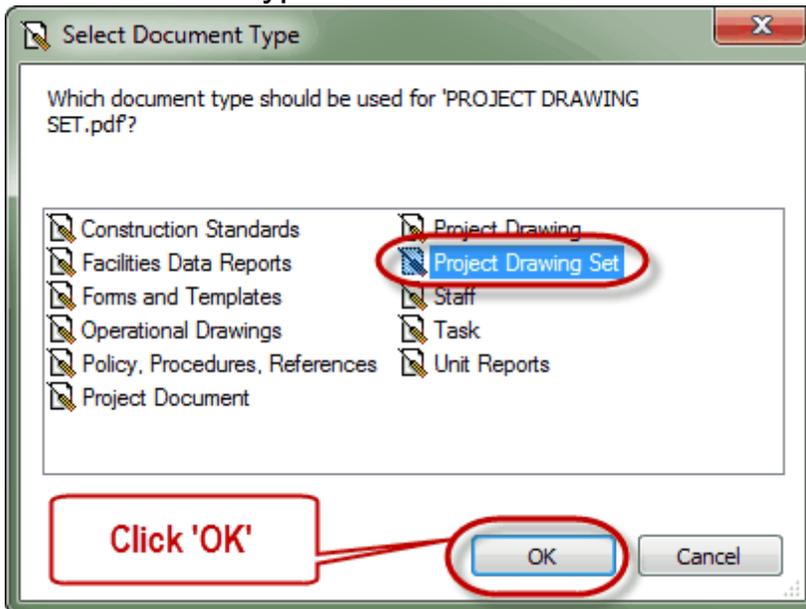
## 6.1 Drag & Drop

Find the drawing set you are going to add and drag it into Meridian. You do NOT need to conduct a search first.

- Meridian will file the drawing set based on the indexing properties you fill in, so the location you drop it in doesn't matter other than making sure you are in the Operational Vault and Projects Scope.
- Make sure to drop it ABOVE the line, where the folder structure shows.

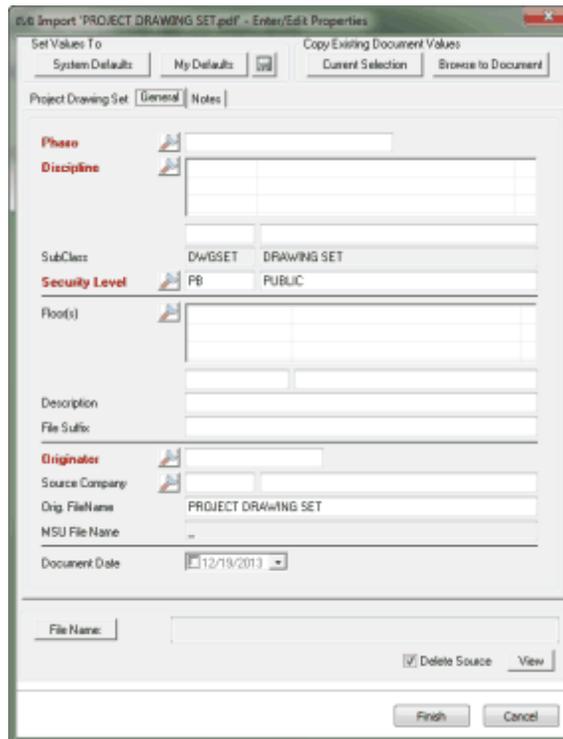


### 3. Document Type Selection



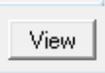
Now you are ready to Describe the Document you are adding to Meridian.

### 6.1.1 Describe the Drawing Set



The **Wizard** is the dialog box that comes up when you are adding a drawing set or editing drawing set properties.

It contains the indexing fields you will fill in so that Meridian can file the drawing set appropriately and everyone working on Capital Projects can find that drawing set if they need to.

- Red fields are required
- Black are optional
- There are 3 tabs where information can be filled out
-  magnifying glass icons are drop-down lists for choosing pre-determined values
-  View button allows you to open and view the document you are adding in order to describe it correctly.

### 6.1.1.1 Project Drawing Set Tab

The Project Drawing Set Tab is where you will fill out the Project Information.

The first thing you will need to do is pick the Project this drawing should be filed under.

- **Click on the magnifying glass next to project.** *\*There is NO other way to select a project. You CANNOT type in this field.*



For instructions on using the Project Selection Tool, please refer to the [Project Document Tab](#) section in training manual.

Import 'training project drawing.dwg' - Enter/Edit Properties

Set Values To: System Defaults My Defaults

Copy Existing Document Values: Current Selection Browse to Document

Project Drawing | General | Notes

**Project**

	1	LEGACY
	REC000001	TEST - TEST - TEST - TEST - TEST - TESTING - TES
	2008	

**Buildings**

<input checked="" type="checkbox"/>	0001	PADLUCCI BUILDING
-------------------------------------	------	-------------------

**Department**

	EAS	ENGINEERING AND ARCHITECTURAL SERVICES
--	-----	--

**Crew**

	FISARCH	RECORDS - ARCHIVES
--	---------	--------------------

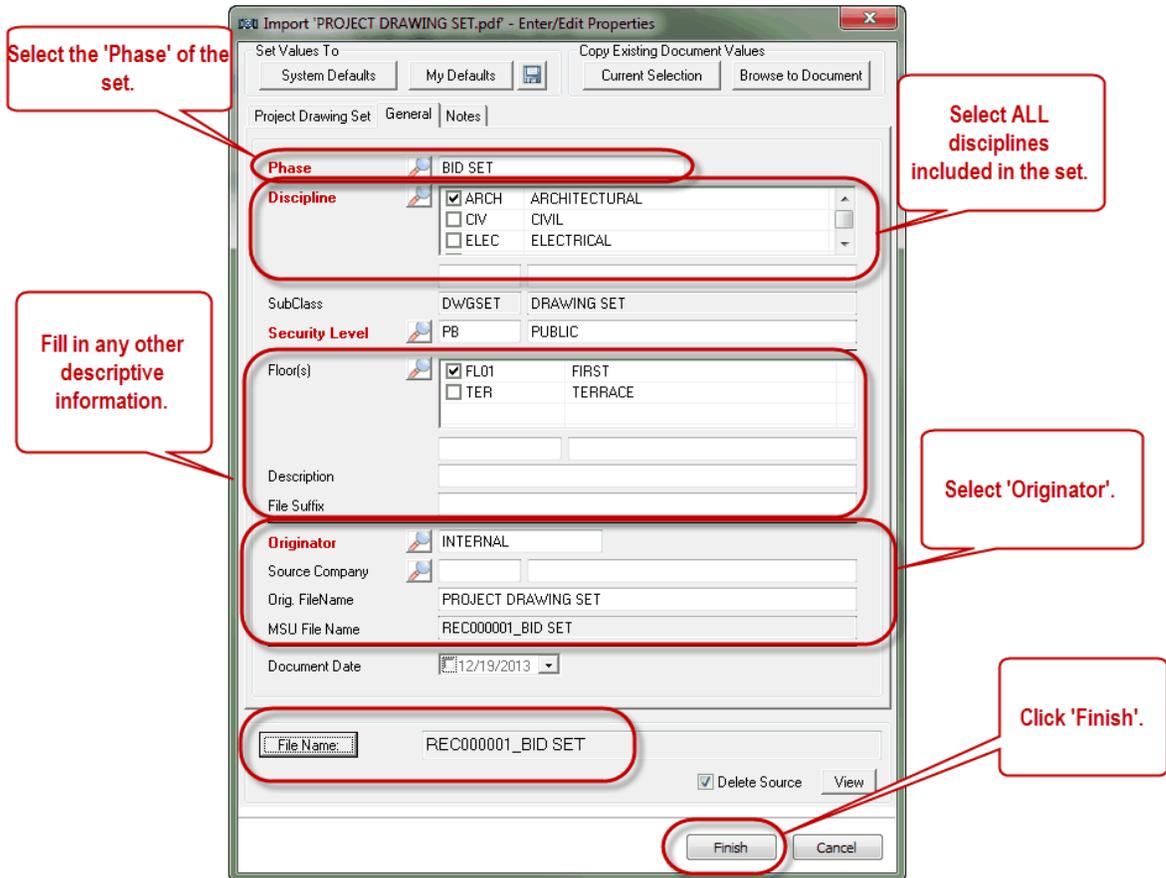
Now the project information is filled out and also Meridian should have auto-populated the department and crew fields based on your user information.

File Name:

Delete Source

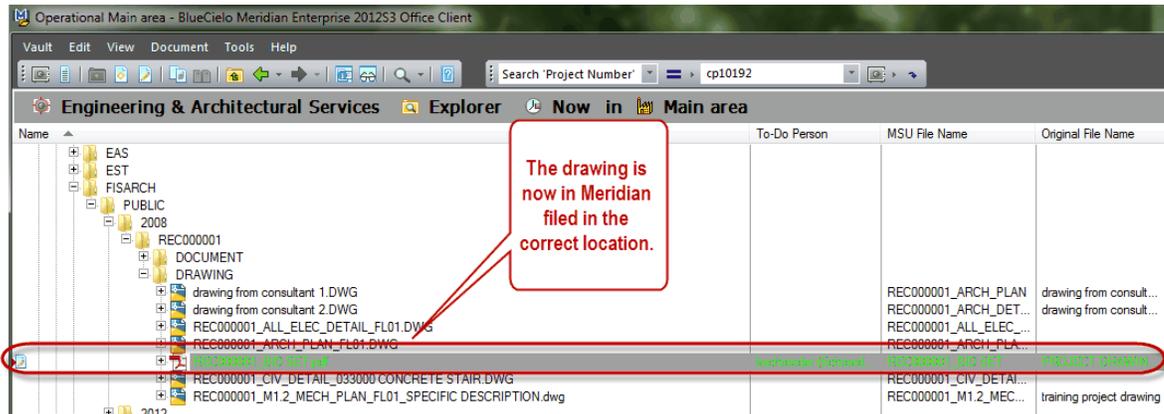
## 6.1.1.2 General Tab

The next thing you will need to do is describe the drawing. Again, use the magnifying glass icon to select values from a drop down list.

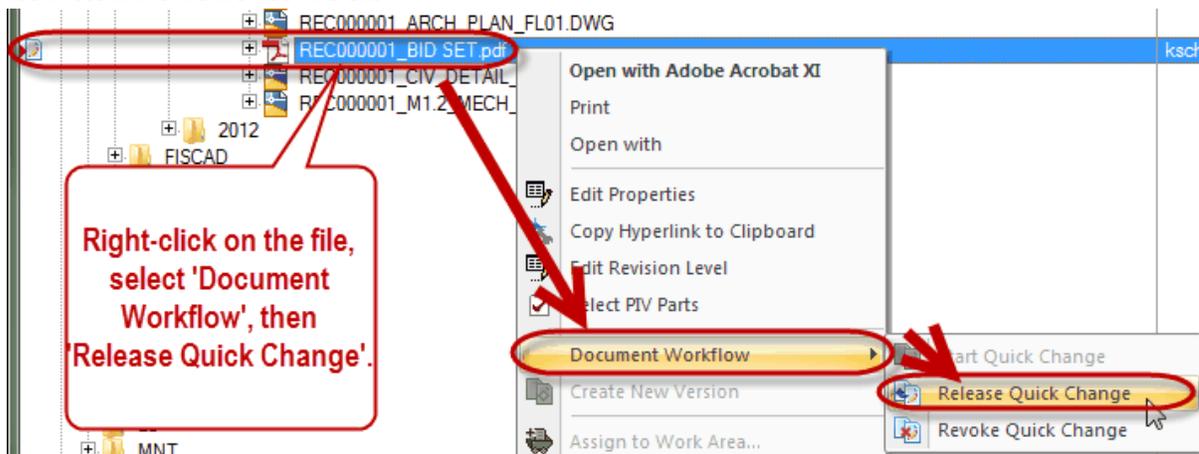


### 6.1.1.3 Finishing Up

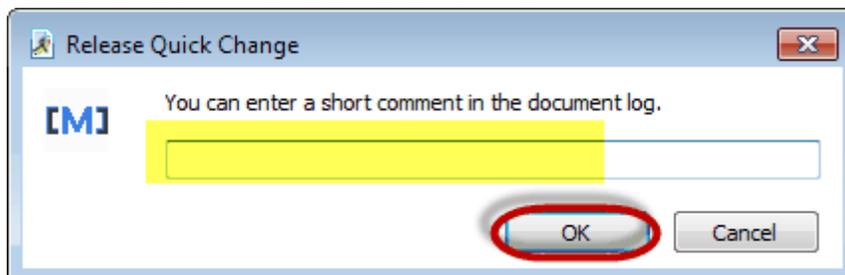
The drawing you added is now in Meridian, filed correctly. Meridian will automatically take you to the drawing you just added.



Now you will need to Release the document for Meridian to store the first version of it.



Enter a comment and click 'OK'.



## 6.2 Exercise 24

### Drag & Drop a drawing set pdf into Meridian

Please Drag & Drop a Project Drawing Set pdf into Meridian Projects.

- For this exercise, you can choose any pdf document from anywhere on your computer.

**\* Do NOT select 'Delete Source' during this exercise.**

- Add the document as an INTERNAL document. Fill in the Wizard completely and click Finish.

- Remember to Release the Documents!

\*you will have 7 minutes\*

## 7 Extras

### 7.1 Working Copies - Terminology & Definitions



- When you are working on a document in Projects, it will be in the 'Quick Change' status in Meridian. This means that users will be able to VIEW and USE the document as the changes are being made.
- It is important to 'Release' the document into the vault when you are finished so users know it is the completed, updated version.

Below is the list of terminology you will see in meridian regarding working copies:

**Start Quick Change:**

To Modify a document

**Quick Change:**

When you create a new blank document in Meridian, it is added into the Quick Change status.

**Release Quick Change:**

When you are finished working on the document

**Release:**

When you create a new blank Document in Meridian and are finished working on it.

**Revoke Quick Change:**

When modifying,if you made a mistake and don't want to save the changes you made into Meridian Projects

**Revoke Documents:**

If you created a new blank document in Meridian and don't want to save it

*When you are adding and modifying documents in the Operational vault, you will have to perform these actions.*

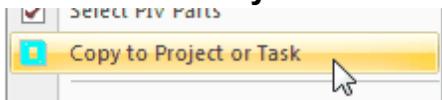
## 7.2 Best Practices & Shortcuts

There are certain things to remember that can make using Meridian easier.

### 7.2.1 Ensuring use of most current document

#### Copy to Project or Task:

- When working in the Operational Vault, use copy to project or task feature to use a template to start a document or drawing from.
- This will ensure you are starting from the most current version.



#### Delete Source:

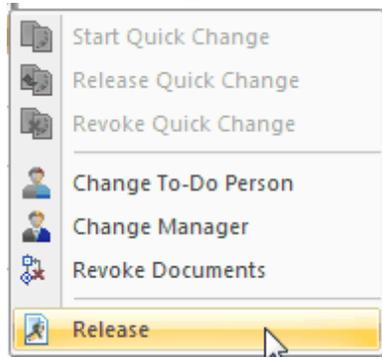
- When working in the Operational Vault, make sure you select 'Delete Source' on the wizard.
- This will ensure one copy that everyone will use instead of multiple versions all over the office.



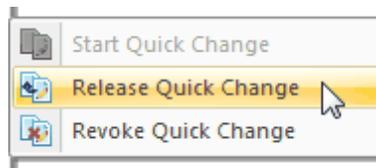
#### Release Quick Change:

- Remember to 'Release' the document/drawing into the Operational Vault when you are done modifying it.
- If you don't, other users won't be able to have access to the most current version.
  - if you created the file within Meridian, it will be 'Release'
  - If you added it by any other method or are modifying, it will be 'Release Quick Change'

#### Quick Change'



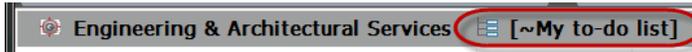
OR



## 7.2.2 Nav View Shortcuts

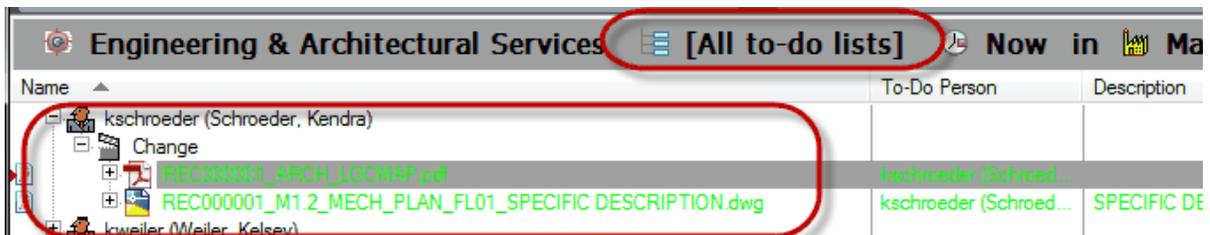
### My To-Do List:

- To check any "Quick Change" documents/drawings you have assigned to do, use the 'my to-do list' Nav View.



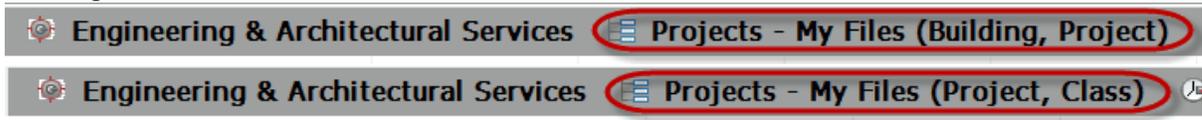
### All To-Do List:

- To check all "Quick Change" documents/drawings, use the 'all to-do list' Nav View.



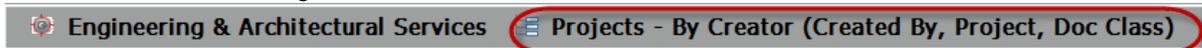
### 'My Files' Nav Views:

- Use these nav views to locate ANY files you have added to the Projects area in Meridian.



### 'By Creator' Nav View:

- Use this nav views to locate which files were added by a certain user to the Projects area in Meridian.



### 7.2.3 Current Selection adding option

#### Current Selection:

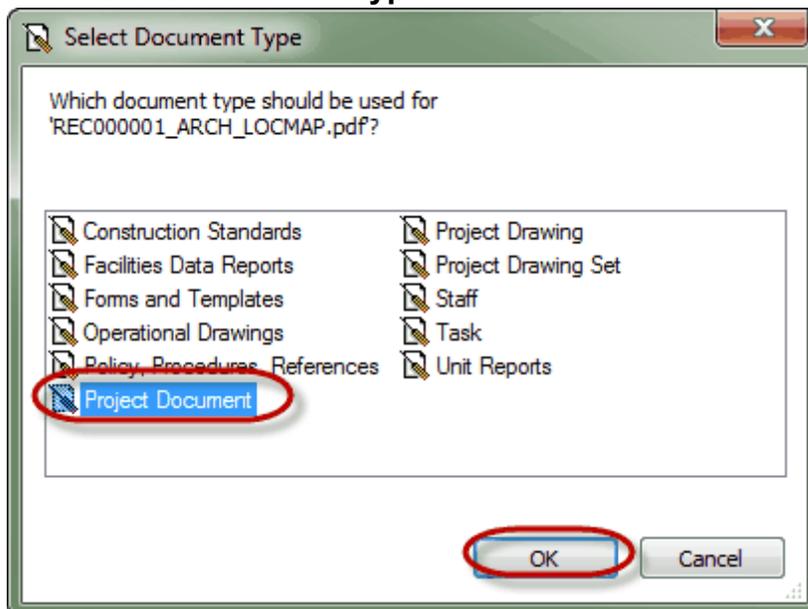
- Helps expedite the adding process if you are adding multiple documents or drawings with some of the same attributes
  - a. Add the first file using normal procedure. **Release it!!!**
  - b. Make sure the file you just added is selected. Make sure it is the **ONLY** file selected!!!

	REC000001_LAND_PLAN.dwg	Project Drawing	DRA'
	REC000001_M1.2_MECH_PLAN_FL01_SPECIFIC DES...	Project Drawing	DRA'
	REC000001_NOTICE_UTILSHUTDN_STEAM.DOCX	Project Document	DOC
	REC000001_PROJREQ.DOCX	Project Document	DOCI
	REC000001_PROJREQ_DESCRIPTION.docx	Project Document	DOCI

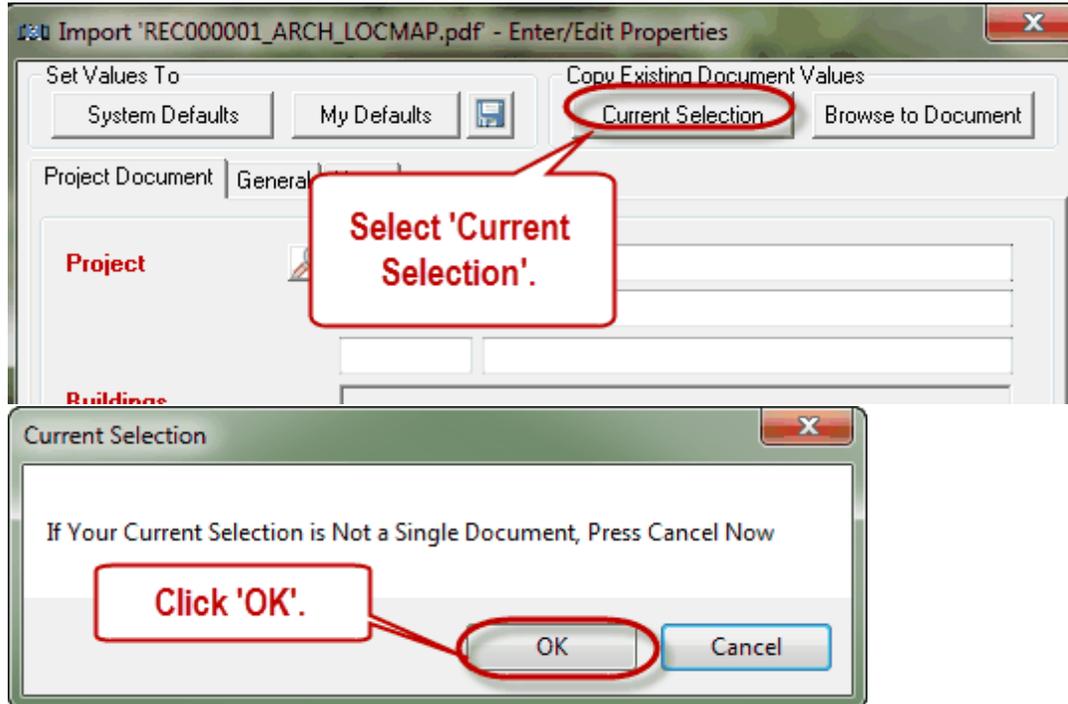
- c. Drag & drop file you are adding into Meridian. As long as the file you want it to mimic is selected, it doesn't matter where you drop it. Select 'As New Document'.

	REC000001_CIV_DETAIL_033000 CONCRETE STAIR...	Project Drawing	DRAWING	DETAIL
	REC000001_CORRESP_FAX_TO_SAMANTHA.DOCX	Project Document	DOCUMENT	CORRESPONDEN
	REC000001_CORRESP_LETTER_TO_LORENA.DOCX	Project Document	DOCUMENT	CORRESPONDEN
	REC000001_CORRESP_SCOTT_-RELEASE.pdf	Project Document	DOCUMENT	CORRESPONDEN
	REC000001_FAXTRANS.DOTX	Project Document	DOCUMENT	TRANSMITTAL
	REC000001_FNLPAYFORM.PDF	Project Document	DOCUMENT	PAYMENT,
	REC000001_LAND_PLAN.dwg	Project Drawing	DRAWING	
	REC000001_M1.2_MECH_PLAN_FL01_SPECIFIC DES...	Project Drawing	DRAWING	

- d. Select document type.



e. When the Wizard appears, select 'Current Selection'.



f. Notice all the fields fill out EXACTLY like the document or drawing you had selected in Meridian.

g. Change the fields that make this document or drawing different than the previously added file. If you don't change anything and it is the same file type (.doc, .pdf, .xls, .dwg, etc.), it will give you an error message.

Remember to 'Release Quick Change' when you are done working on it!!!

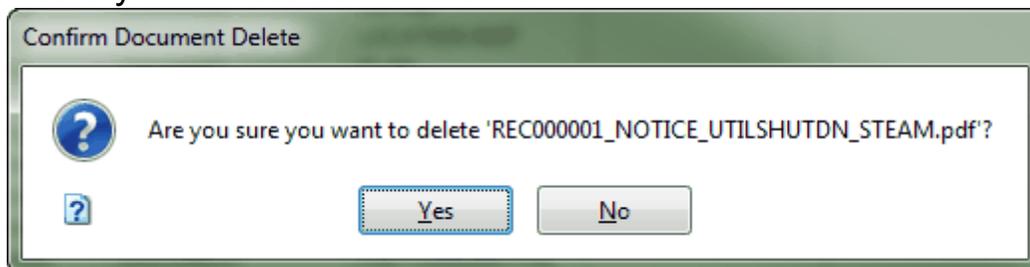
### 7.3 Deleting Documents & Drawings

Everyone in EAS will have permission to Delete Documents & Drawings from Meridian Projects. Because of this, you will have to be extremely careful to make sure you are on the correct file and it is a file no one else is using or will need when you decide to delete it. Thankfully, if you accidentally delete a file... it can be retrieved!!!

- To delete a document and/or drawing in Meridian Projects, all you have to do is select the file and hit either
  - the 'Delete' key
  - 'Ctrl+D" on the keyboard
  - Right-click and select 'Delete'.

Hint - Make sure you are really in Meridian and not a Windows Explorer window and vice versa. Because it is SO easy to delete a file, if you are not 100% inside a windows explorer window, sometimes a selected file in Meridian will delete instead of the file in windows explorer.

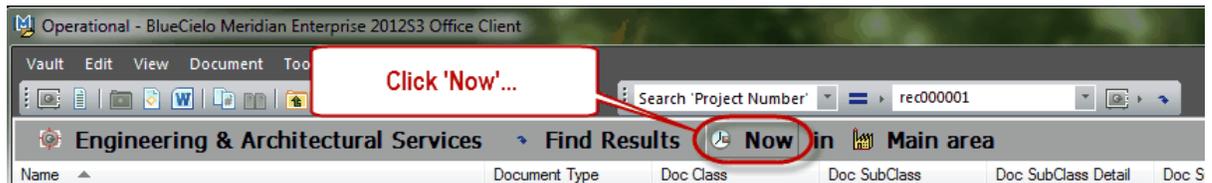
- When prompted, select 'Yes' or 'No' based on whether or not you are sure you want to delete the file.



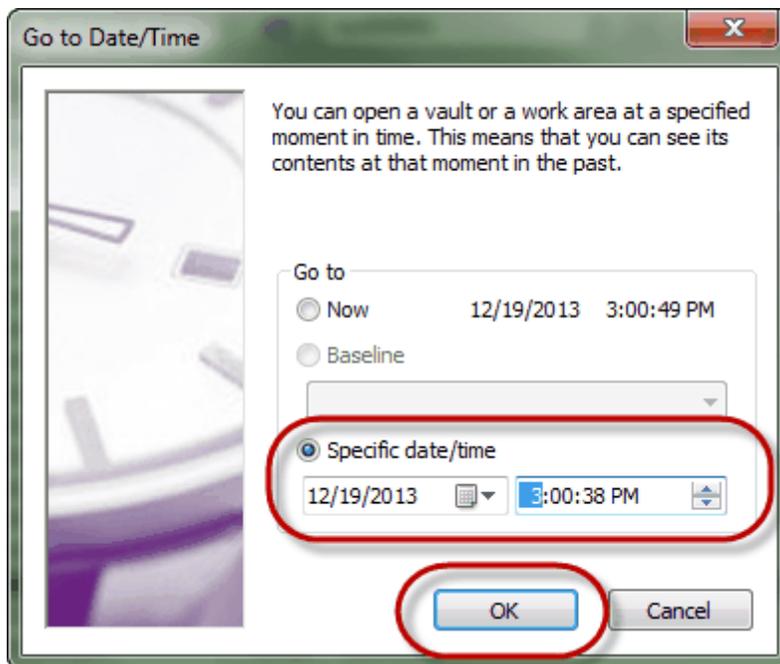
**The file will now be removed from the folder in Meridian.**

If Deleting the file was an accident or mistake... Go Back in Time to get it back:

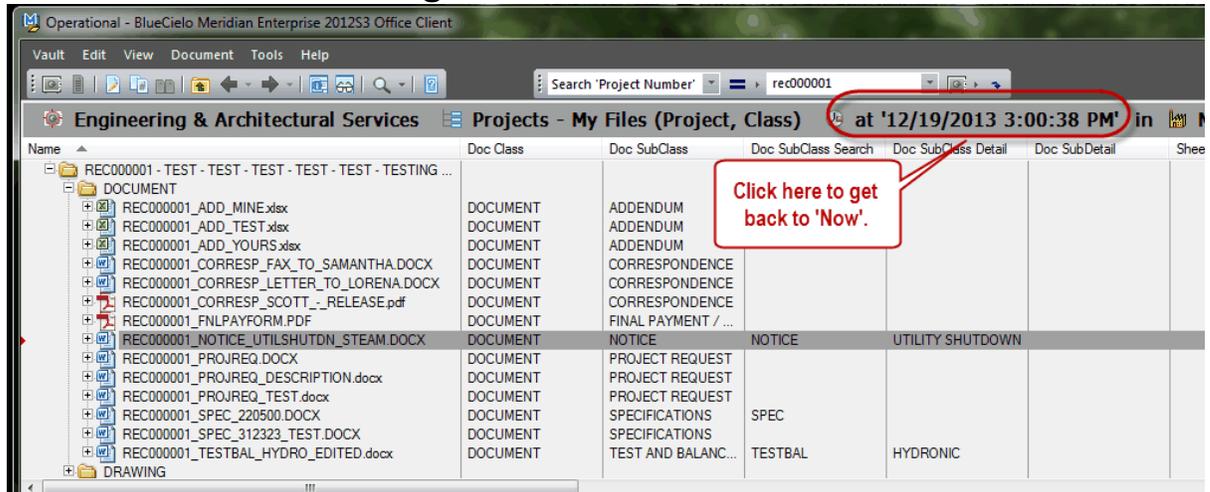
## 1. Click on 'Now'



## 2. Select Date/Time

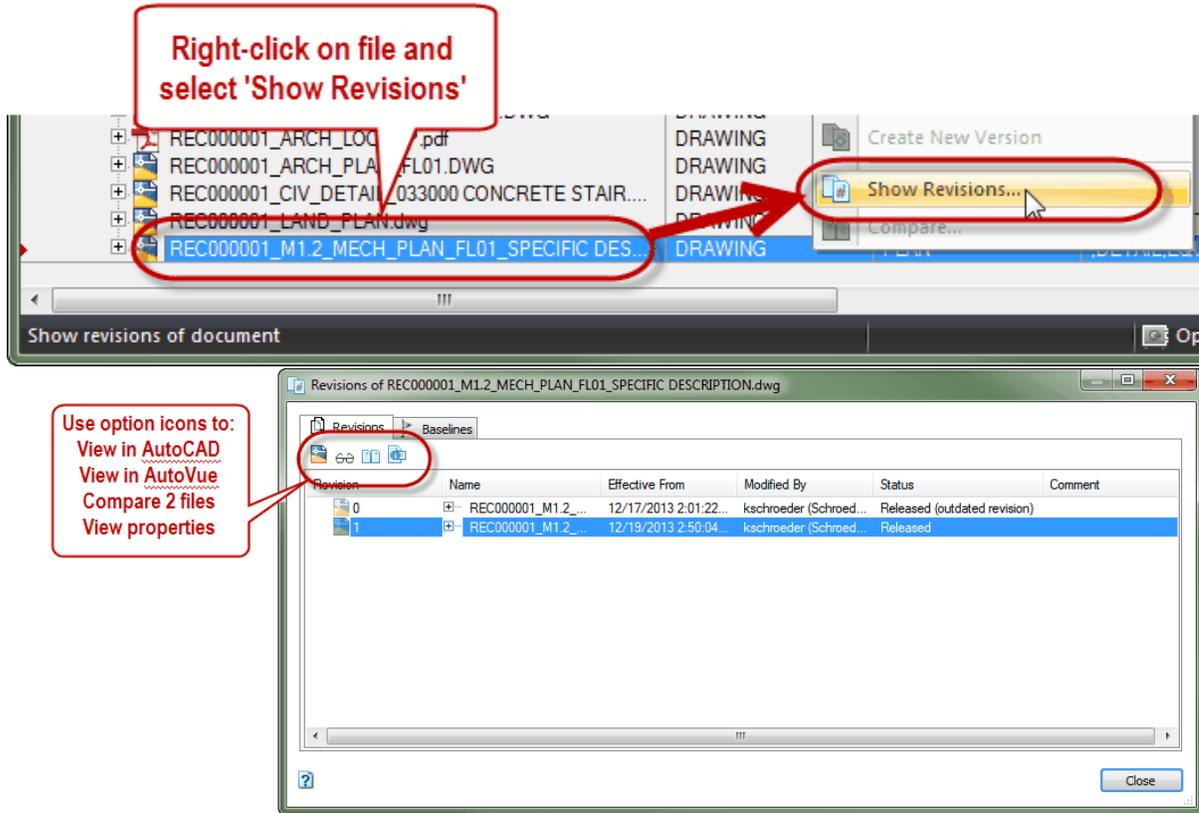


3. Drag the file out of Meridian and re-add it by Drag & Drop method of adding ([Drag & Drop from Outside Meridian](#))  
- You will have to go to 'Now' to re-add.



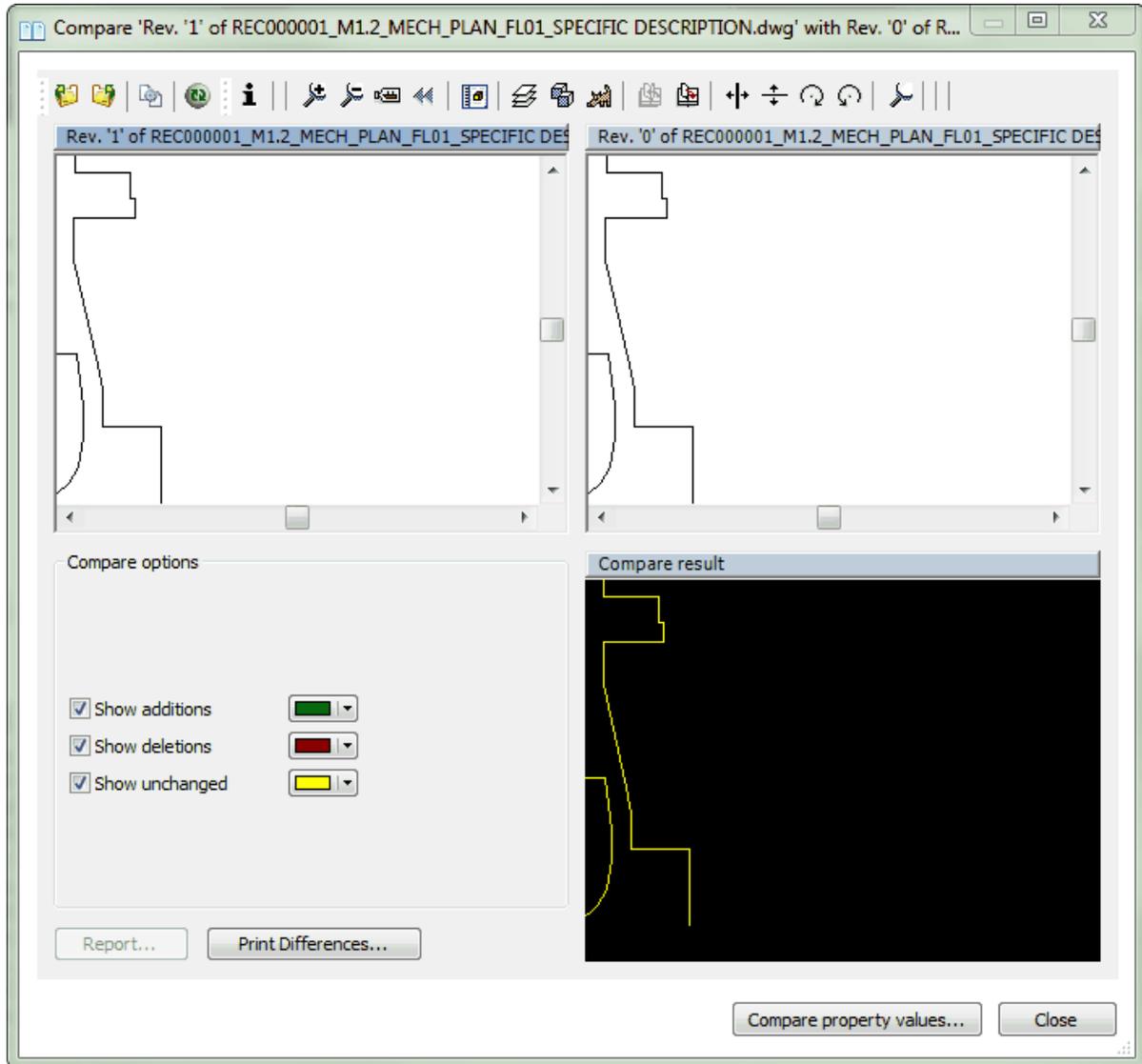
## 7.4 Revision History

As long as the file is stored in Meridian, the revision history will be stored and updated whenever the file is modified and you will be able to get to the previous version of the file.

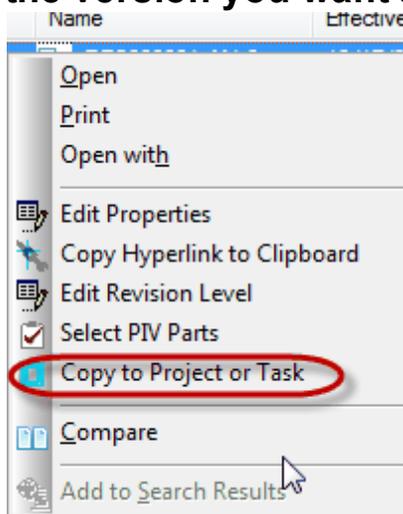


To compare two of the files in the revision log:

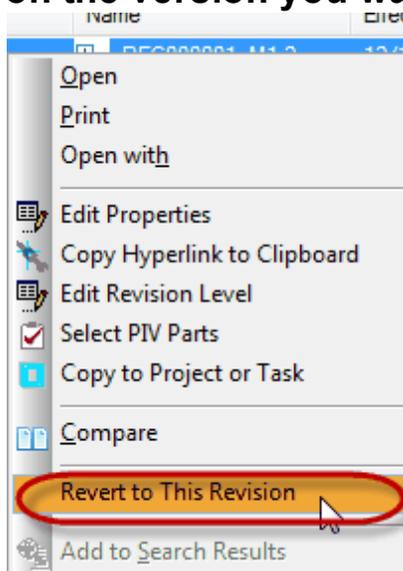
- Click on 'Compare' button 



To copy a previous version of the file to a Project, right click on the version you want and select 'Copy to Project or Task':

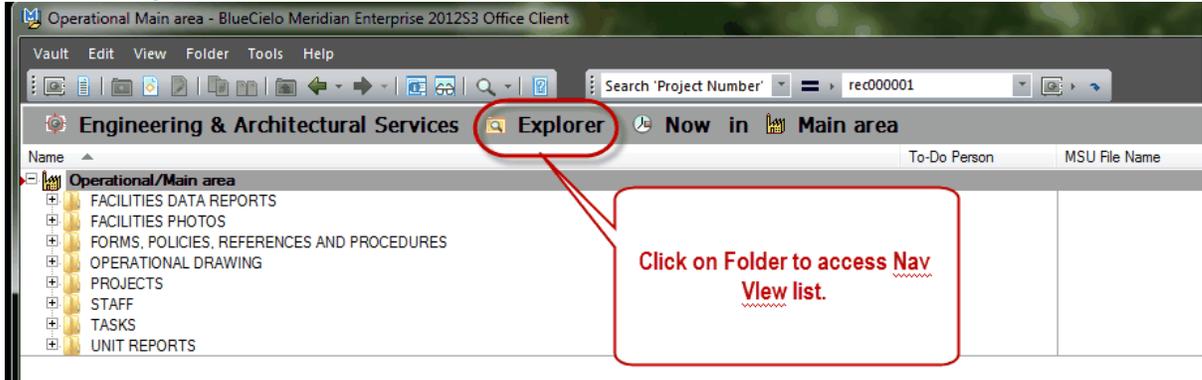


To revert to a previous version of the file to a Project, right click on the version you want and select 'Revert to This Revision':

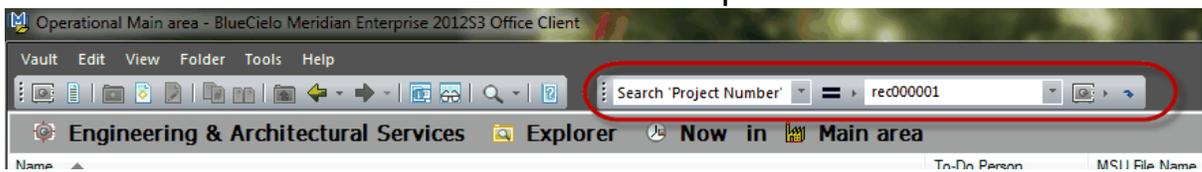


## 7.5 Searching

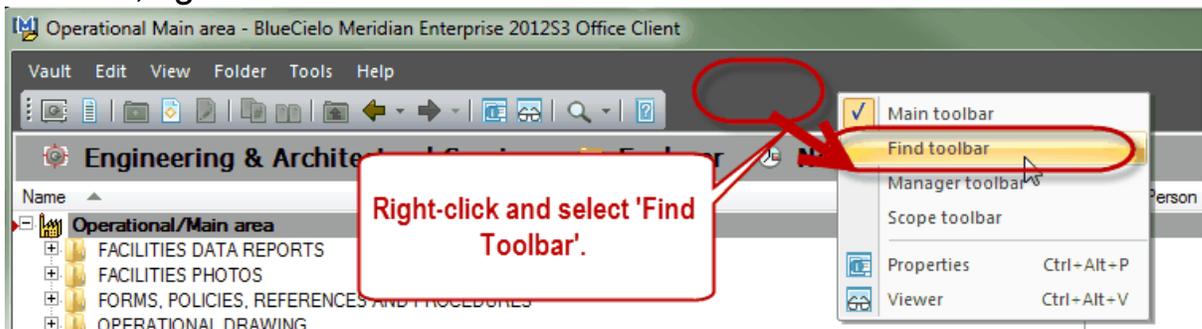
- **Nav Views** - pre-determined searches administrators set up using indexing properties



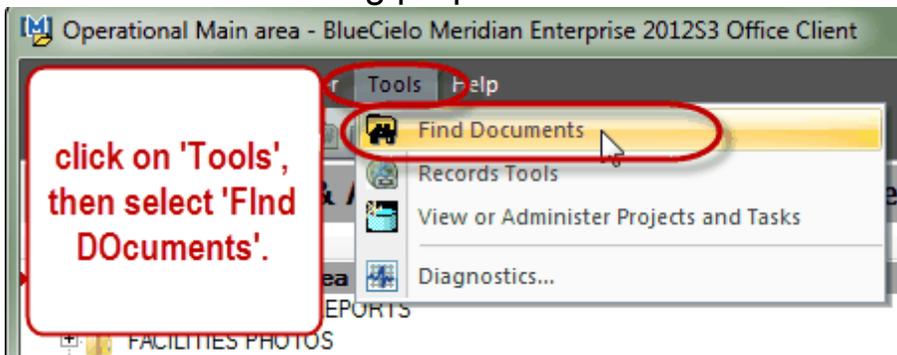
- **Basic Search (Find Toolbar)** - user can type what property they would like to search for or select from drop down lists.



The find toolbar turns off occasionally for various reasons. To turn it back on, right-click in area where it should be and select Find Toolbar.



- **Find Documents (Tools Menu)** - User can choose from the drop down lists of indexing properties to search



- **Collections** - A view the user can set up themselves in their Nav View lists.

\*see user manual from Original Training for detailed instructions on different types of searching Meridian.

ASK ANY OF THE FIS STAFF FOR HELP ANYTIME!!!