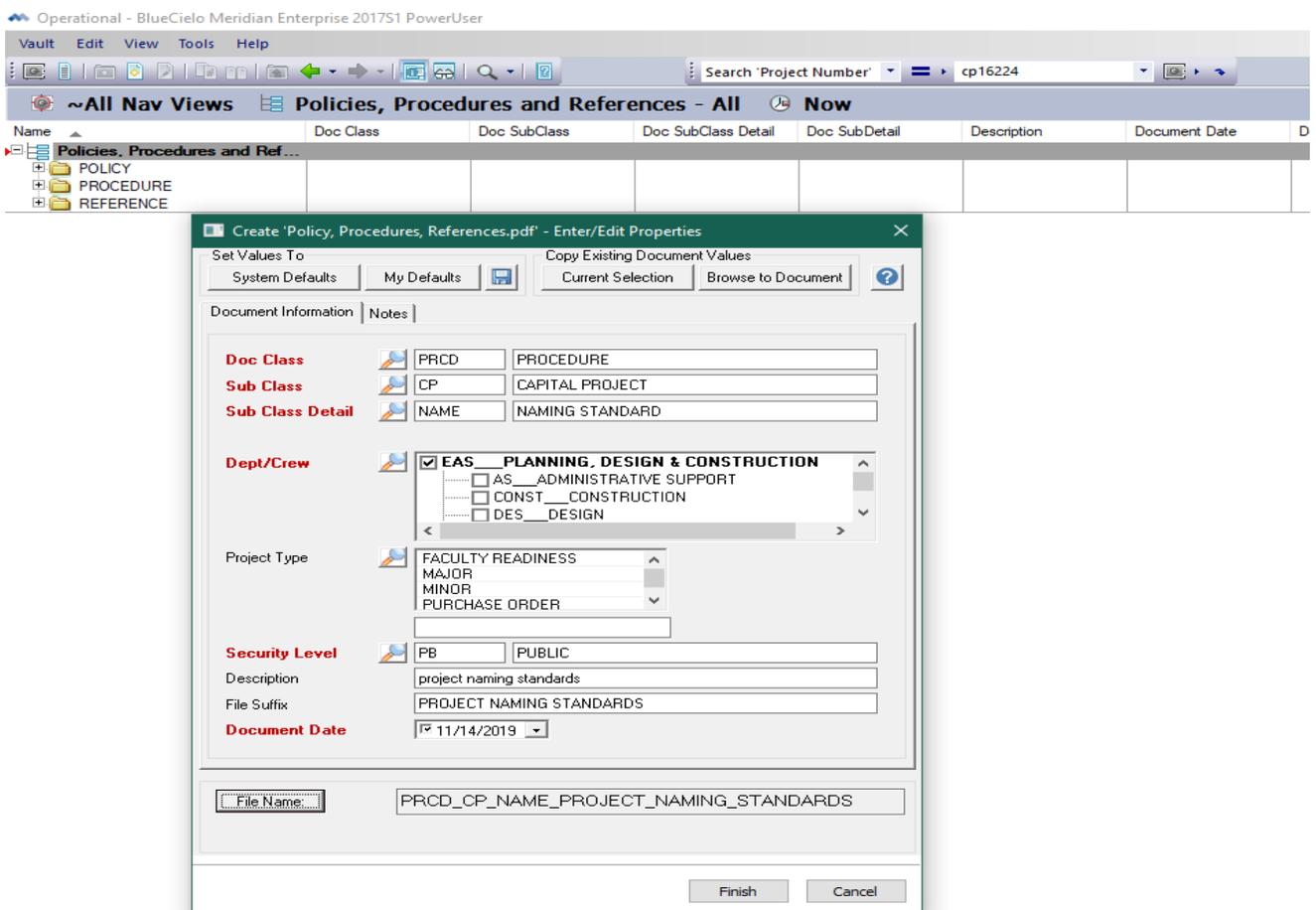


DOCUMENT MANAGEMENT SYSTEM

Policies, Procedures & References Editor

This manual will provide step-by-step training for accessing, adding and modifying Policies, Procedures and References in the Meridian Document Management System on the Campus of Michigan State University.



MICHIGAN STATE UNIVERSITY

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November 14, 2019

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1 Policies, Procedures & References

A select group of individuals have permissions to add and modify documents in Policies, Procedures and References within the Operational Vault in Meridian. Some of the Policies, Procedures and References will be published to the web.

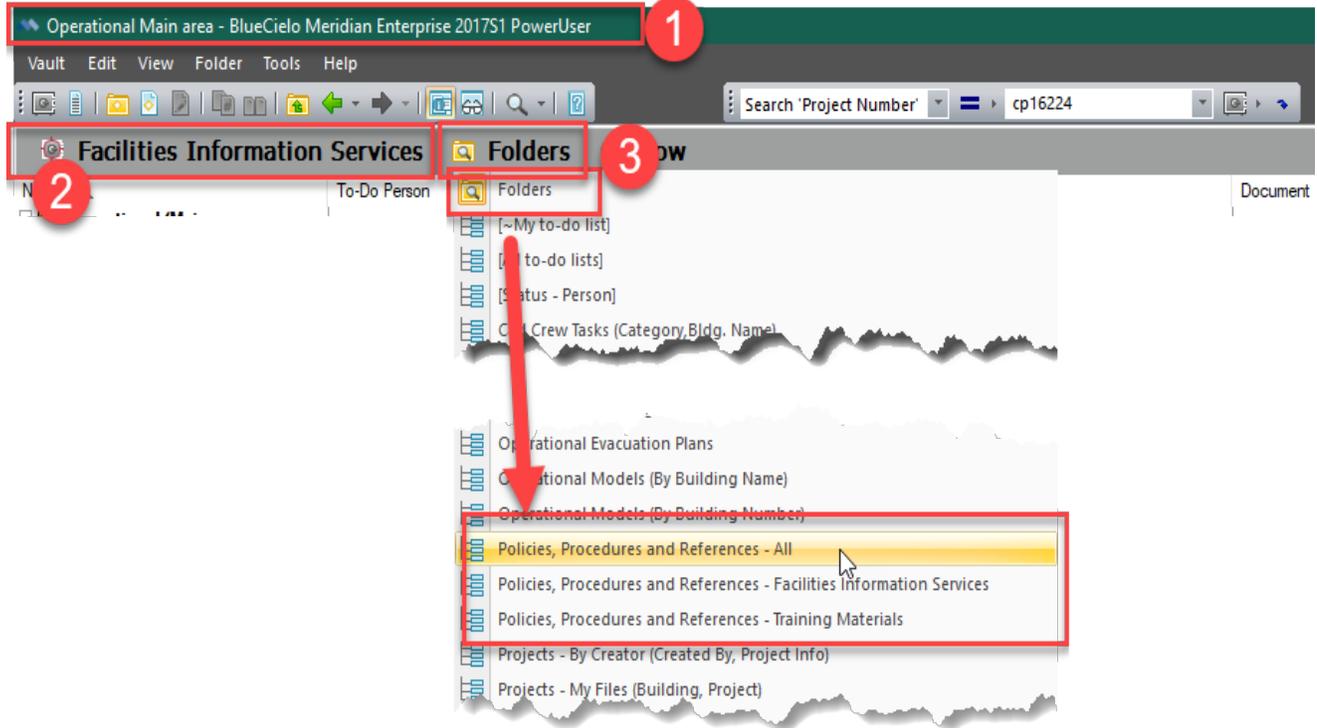
Permissions for the Policies, Procedures and References are based on which department and crew you are a part of.

Because one single Policy, Procedure or Reference can be used by multiple crews, when you use the Policies, Procedures and References Nav Views, pay attention to the 'Crew Code' column. If your crew is not displayed there, you do not have permissions to modify that document.

Name	Doc Class	Doc SubClass	Doc SubClass Detail	Doc SubDetail	Description	Document Date	Department	Crews	Crew Code	Submit Release Date
REF_ACTNPLN.pdf	REFERENCE	ACTION PLAN				8/31/2017 12:00:00 ...	COMMUNICATIONS		COMM	8/31/2017 8:33:45
REF_ACTNPLN_MOBIL...	REFERENCE	ACTION PLAN				9/13/2017 12:00:00 ...	ADMINISTRATION		ADMIN	2/2/2018 10:29:45
REF_ACTNPLN_SAMPL...	REFERENCE	ACTION PLAN			SAMPLE - SUSTAIN...	10/3/2014 12:00:00 ...	SUPPORT SERVICES		HR	10/3/2014 1:20:33
REF_ARTCAMPUS_AR...	REFERENCE	ART ON CAMPUS	ART ON CAMPUS	ART ON CAMPUS	AD-HOC COMMITT...	8/5/2010 12:00:00 ...	ENGINEERING AN...	.DES,	DES	12/8/2013 6:56:12
REF_ARTCAMPUS_AR...	REFERENCE	ART ON CAMPUS	ART ON CAMPUS	ART ON CAMPUS	PAOCC	9/21/1999 12:00:00 ...	ENGINEERING AN...		DES	1/26/2016 9:51:16
REF_ARTCAMPUS_SU...	REFERENCE	ART ON CAMPUS	ART ON CAMPUS	SUBMITTAL REQU...		12/8/2013 12:00:00 ...	ENGINEERING AN...	.CONST,DES,	DES	12/8/2013 6:56:11
REF_ASBESTOS.pdf	REFERENCE	ASBESTOS MANAG...				12/8/2013 12:00:00 ...	ENGINEERING AN...	.CONST,DES,EASA...	CONST	12/8/2013 6:56:17
REF_ASSETSTAND.xlsx	REFERENCE	ASSET STANDARDS				11/11/2019 12:00:00 ...	COMMISSIONING		CXSADMSUP	11/13/2019 9:36:56
REF_ASSETSTAND_AS...	REFERENCE	ASSET STANDARDS			ASSET LIFE EXPEC...	5/22/2019 12:00:00 ...	PLANNING, DESIG...		EAS	5/22/2019 2:22:19
REF_ASSETSTAND_AS...	REFERENCE	ASSET STANDARDS			ASSET STANDARDS	7/2/2018 12:00:00 ...	COMMISSIONING		CXSADMSUP	11/13/2019 9:37:14
REF_ASSETSTAND_AS...	REFERENCE	ASSET STANDARDS			ASSET STANDAR...	2/14/2019 12:00:00 ...	COMMISSIONING		CXSADMSUP	4/11/2019 2:12:46
REF_ASSETSTAND_FA...	REFERENCE	ASSET STANDARDS			FACILITY PM STAN...	7/3/2018 12:00:00 ...	COMMISSIONING		CXSADMSUP	7/3/2018 3:05:05 P

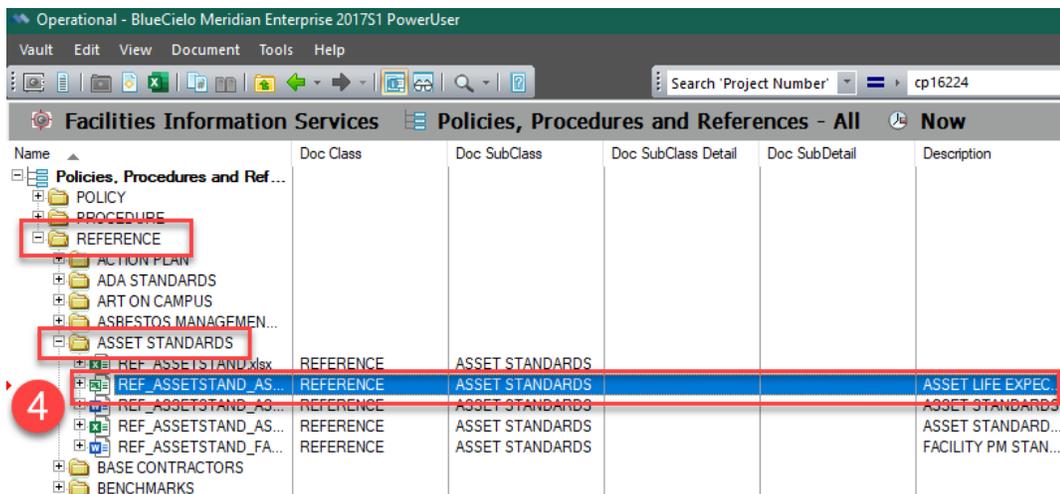
Accessing Policies, Procedures and References

1. Open the Operational Vault
2. Make sure you are in the Scope for your Department or Crew. If not, click on the name of the scope to see a drop-down list.
3. Select one of the Policy, Procedures and References Nav Views.



Modifying a Policy, Procedure or Reference

4. Locate the Document

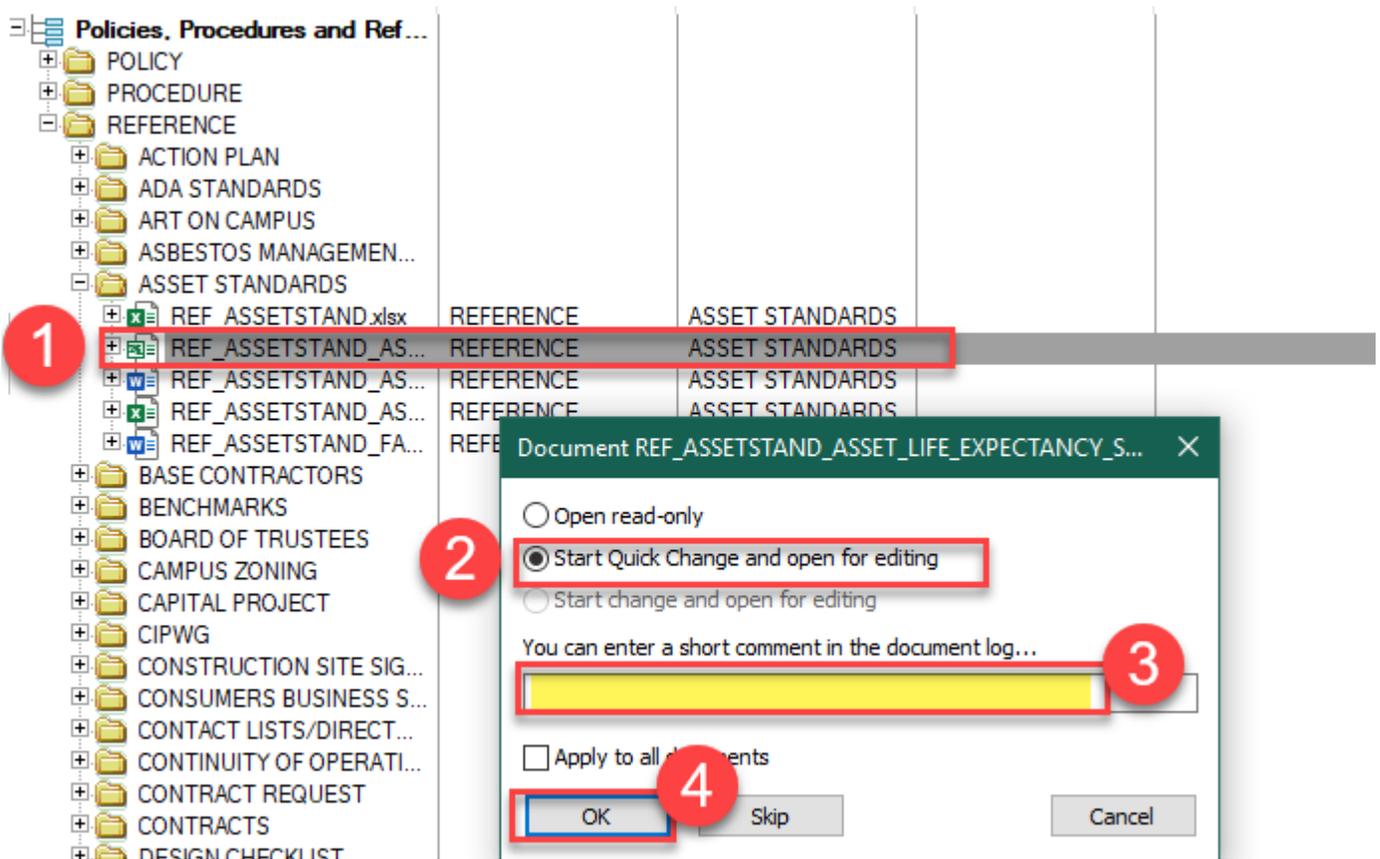


5. Start a Quick Change

- a. Once you have located the Policy, Procedure or Reference that needs to be modified, you will need to **Start a Quick Change**. This action will check the document out to you and prevent other users from being able to modify the document while you update it. Users will still be able to use the document as it was BEFORE you started the quick change.
- b. There are 2 different ways to Start a Quick Change.
 1. Double Clicking - shorter way
 2. Using Menu - longer way

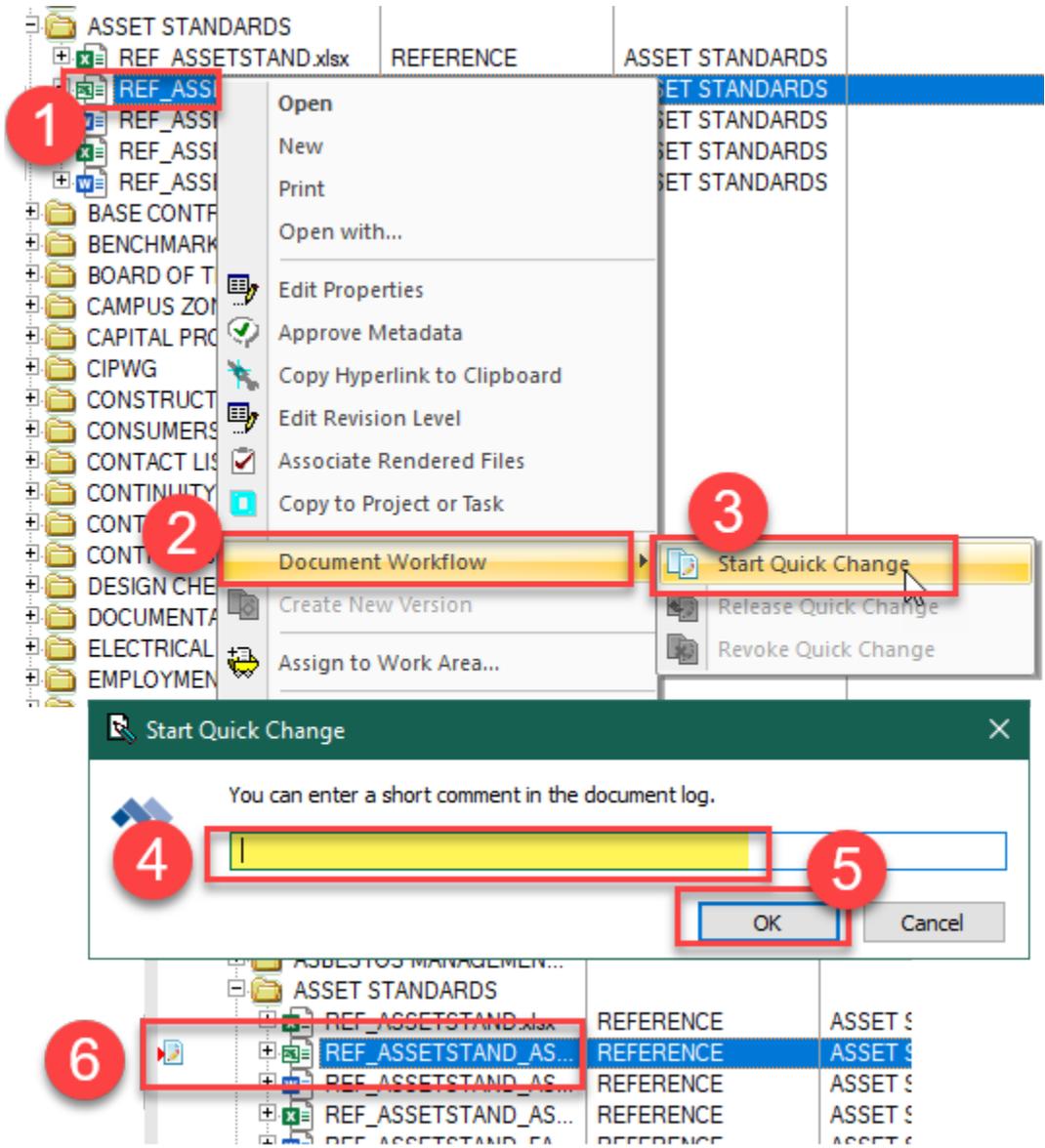
Double Clicking (shorter way)

1. **Double-click** on the document
2. Select **Start Quick Change and open for editing**.
3. **Enter a comment** in the log.
4. Click **OK**



Using Menu (longer way)

1. **Right-click** on document to be modified.
2. Select **Document Workflow**.
3. Select **Start Quick Change**.
4. **Enter a comment** in the log.
5. Click **OK**.
6. **Double-click** file to open for editing.



6. Modifying the Document

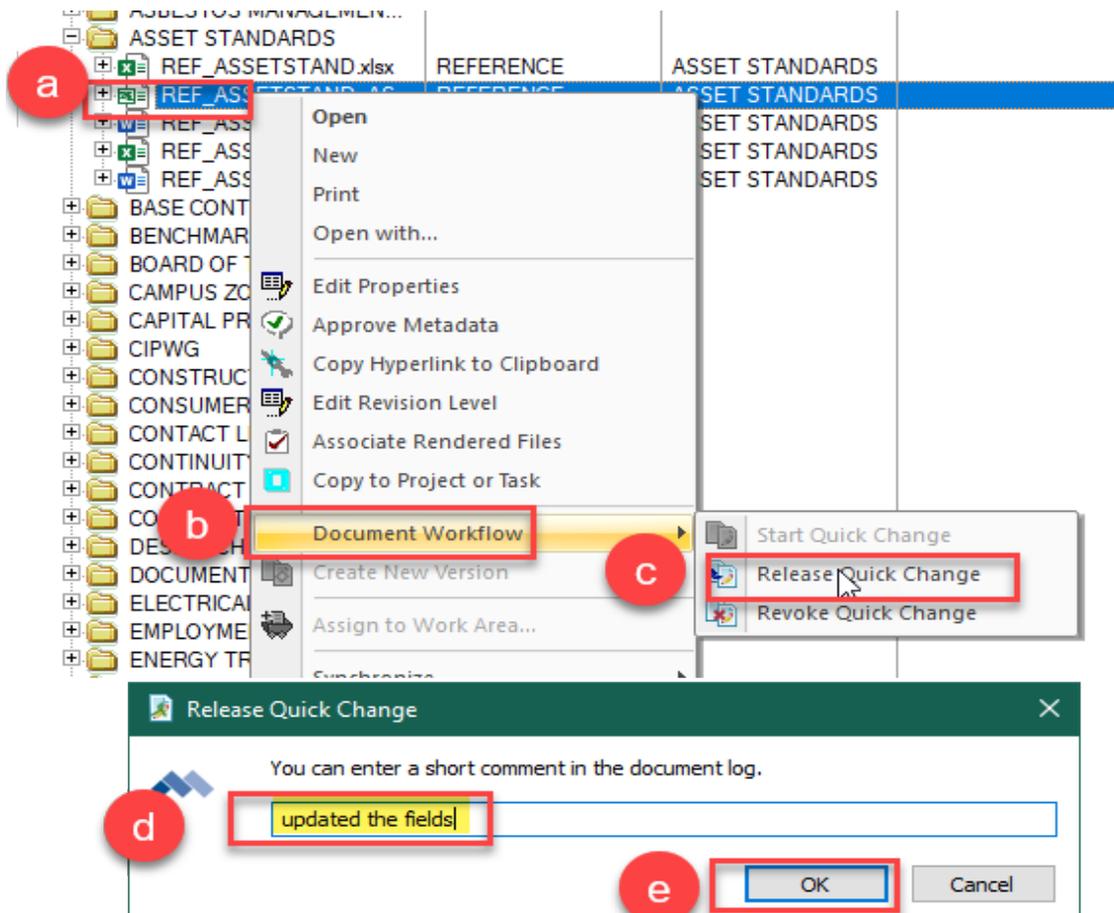
- a. **Make any updates/changes** to the document in the native program of the file.
- b. **Save** the document

When you save the document, it will automatically save the changes you made in Meridian. Once the document is released (the next step), the changes will appear for all users to see.

7. Release the Quick Change

For users to see and use the modified Policy, Procedure or Reference, you will need to **Release the Quick Change**. By selecting 'Release Quick Change' you are telling Meridian your changes are completed.

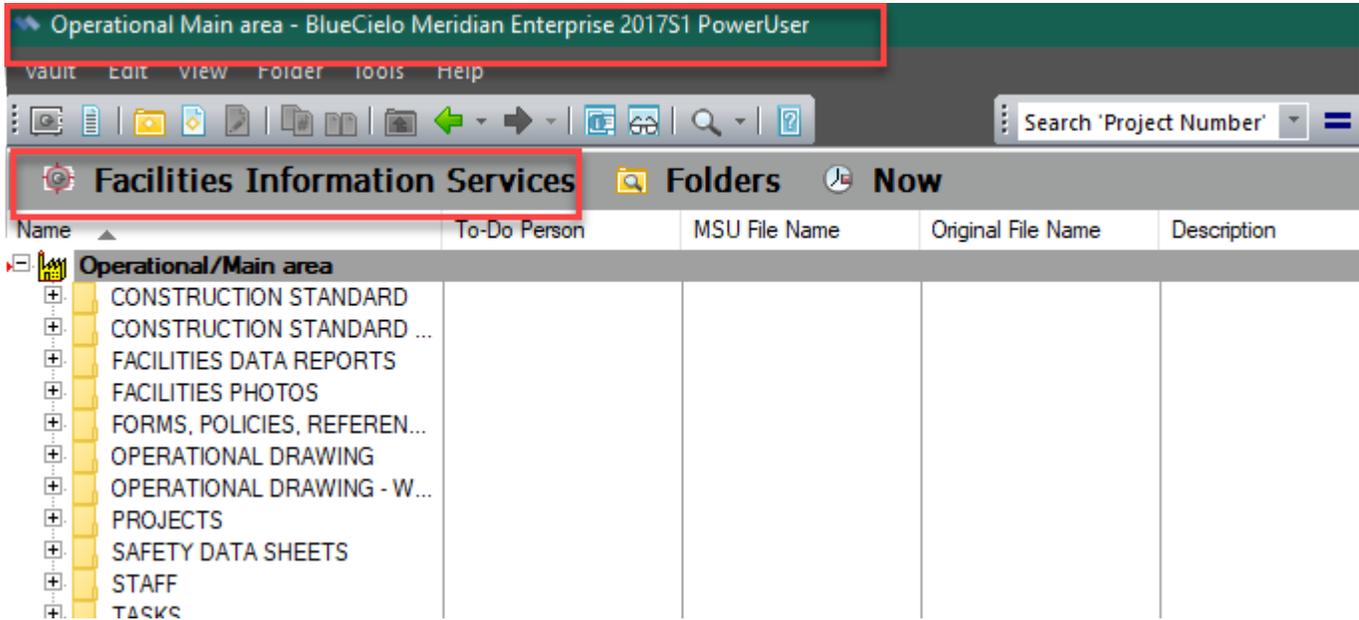
- a. **Right-click** on the document.
- b. Select **Document Workflow**.
- c. Select **Release Quick Change**.
- d. **Enter a comment** in the Log.
- e. Click **OK**.



Adding a Policy, Procedure or Reference

To add a document to the Policies, Procedures and References in Meridian, you will have to have the correct permissions to add documents for your department or crew.

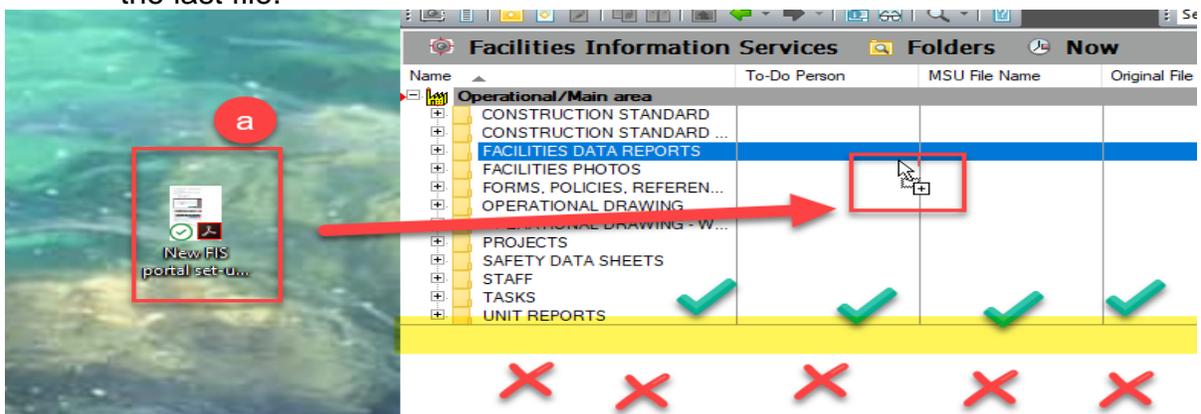
Open Meridian to the Operational Vault and make sure you are in the Scope for your department/crew. You do NOT need to conduct a search or open the PPR folder.



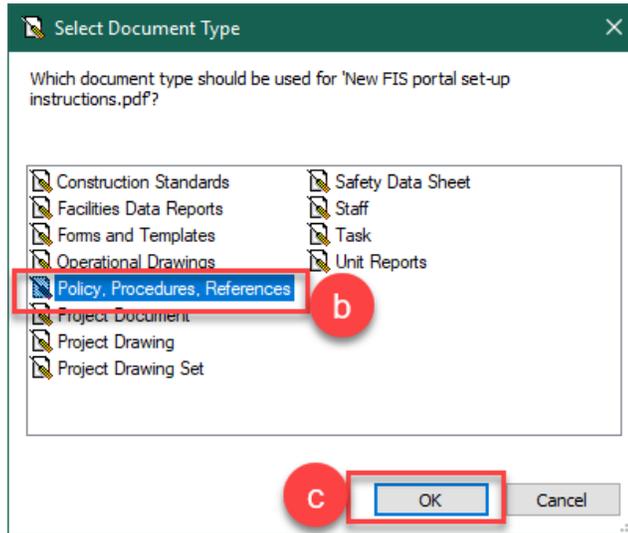
1. Drag & Drop

To add a Policy, Procedure or Reference, simply drag & drop the document into Meridian. The document should already be created outside of Meridian.

- Drag and drop the file into Meridian. Stay above the line under the last file.

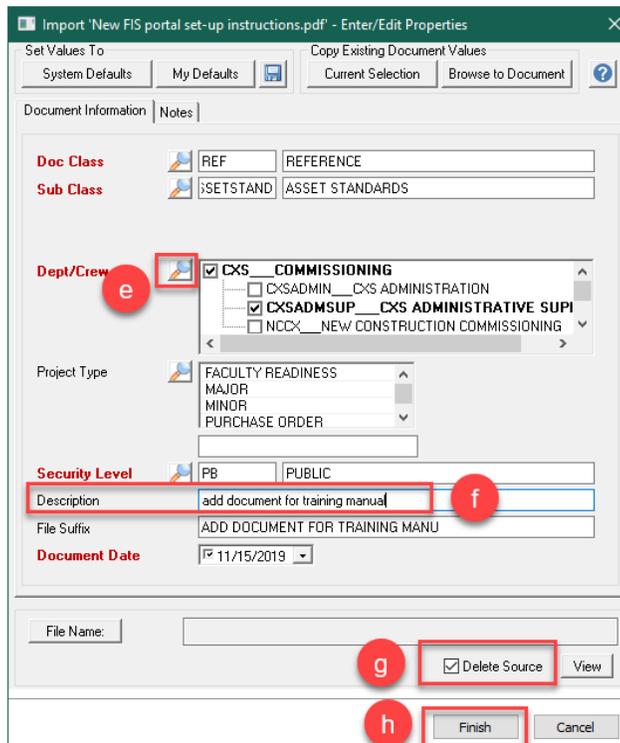


- b. Select the **Document Type** of Policies, Procedures, References
- c. Click **OK**.



2. Describe the Document

- d. Fill in the wizard with the appropriate metadata.
- e. For Department and Crew, see instructions below. **Use Magnifying glass** to access them.
- f. If a description is needed, only fill out the **Description** field and leave the **File Suffix** alone. This autopopulates.
- g. **Check the box** to delete the file outside of Meridian and have Meridian be the single source for the file.
- h. Click **Finish** when the wizard is done being filled out.



e. Department/Crew Selection

This field will determine two things...

1. Which crew is responsible for maintaining the document (primary crew)
2. Which crews will want to view the document in their department/crew specific Nav Views.

If the file pertains to ALL IPF departments and crews:

- a. click the **Search** button
- b. **select** the entire list.
- c. Click **OK**
- d. Pick a **primary crew** by checking the appropriate box (responsible for maintaining the file).
- e. Click **OK**.

Dept/Crew

Levels

Dept

Crew

Search

<< Filter

Depar
ADMIN
CPA
CXS

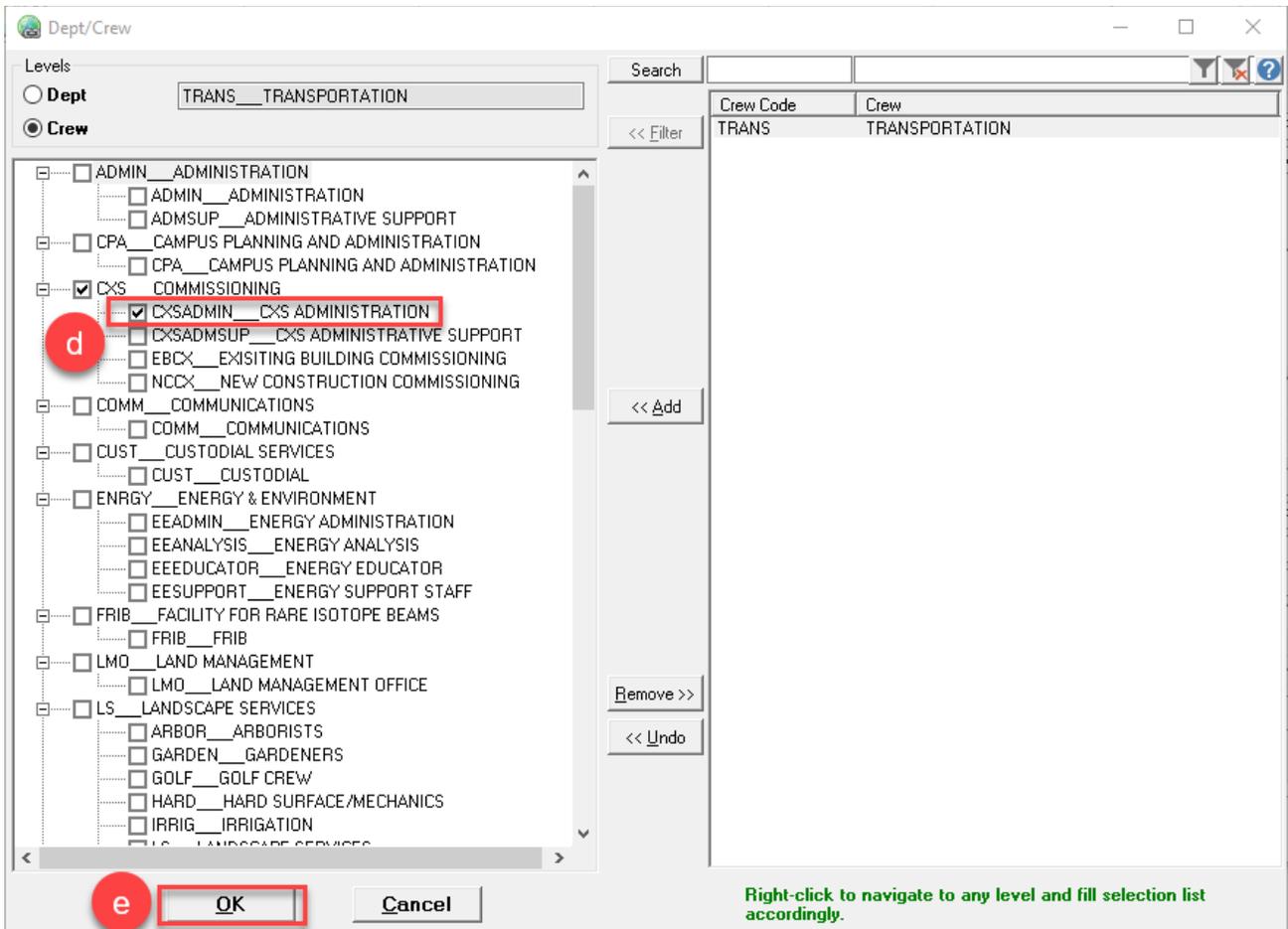
Select Dept/Crew

Global Search

Department Code	Department	Crew Code	Crew
ADMIN	ADMINISTRATION	ADMIN	ADMINISTRATION
ADMIN	ADMINISTRATION	ADMSUP	ADMINISTRATIVE SUPPORT
CPA	CAMPUS PLANNING AND ADMINISTRATION	CPA	CAMPUS PLANNING AND ADMINISTRATION
CXS	COMMISSIONING	CXSADMIN	CXS ADMINISTRATION
CXS	COMMISSIONING	CXSADMSUP	CXS ADMINISTRATIVE SUPPORT
CXS	COMMISSIONING	EBCX	EXISTING BUILDING COMMISSIONING
CXS	COMMISSIONING	NCCX	NEW CONSTRUCTION COMMISSIONING
COMM	COMMUNICATIONS	COMM	COMMUNICATIONS
CUST	CUSTODIAL SERVICES	CUST	CUSTODIAL
ENRGY	ENERGY & ENVIRONMENT	EEADMIN	ENERGY ADMINISTRATION
ENRGY	ENERGY & ENVIRONMENT	EEANALYSIS	ENERGY ANALYSIS
ENRGY	ENERGY & ENVIRONMENT	EEEDUCATOR	ENERGY EDUCATOR
ENRGY	ENERGY & ENVIRONMENT	EESUPPORT	ENERGY SUPPORT STAFF
FRIB	FACILITY FOR RARE ISOTOPE BEAMS	FRIB	FRIB
LMO	LAND MANAGEMENT	LMO	LAND MANAGEMENT OFFICE
LS	LANDSCAPE SERVICES	ARBOR	ARBORISTS
LS	LANDSCAPE SERVICES	GARDEN	GARDENERS
LS	LANDSCAPE SERVICES	GOLF	GOLF CREW
LS	LANDSCAPE SERVICES	HARD	HARD SURFACE/MECHANICS
LS	LANDSCAPE SERVICES	IRRIG	IRRIGATION
LS	LANDSCAPE SERVICES	LS	LANDSCAPE SERVICES
LS	LANDSCAPE SERVICES	LSSUPP	LANDSCAPE SUPPLY
LS	LANDSCAPE SERVICES	NURSERY	NURSERY
LS	LANDSCAPE SERVICES	SITE	SITE CREW
LS	LANDSCAPE SERVICES	TURF	TURF CREW
MAINT	MAINTENANCE SERVICES	MAINT	MAINTENANCE
SAFE	OCCUPATIONAL SAFETY AND COMPLIANCE	SAFE	OCCUPATIONAL SAFETY AND COMPLIANCE

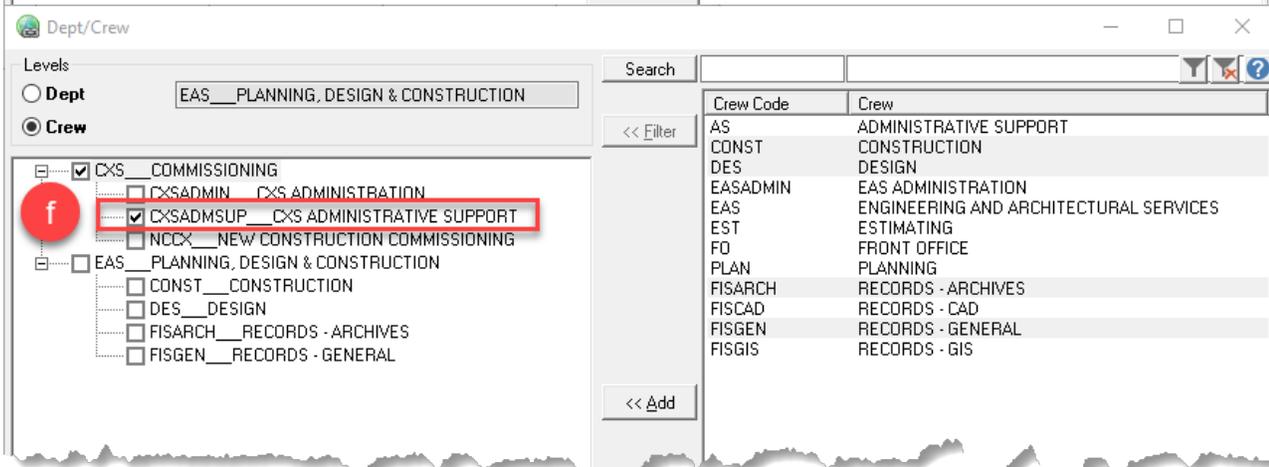
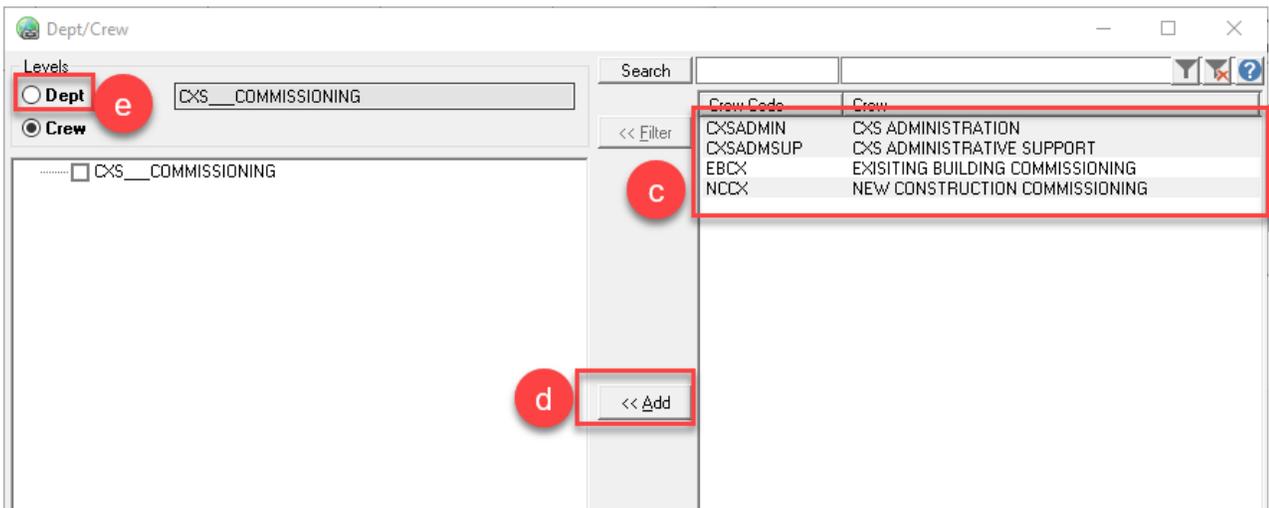
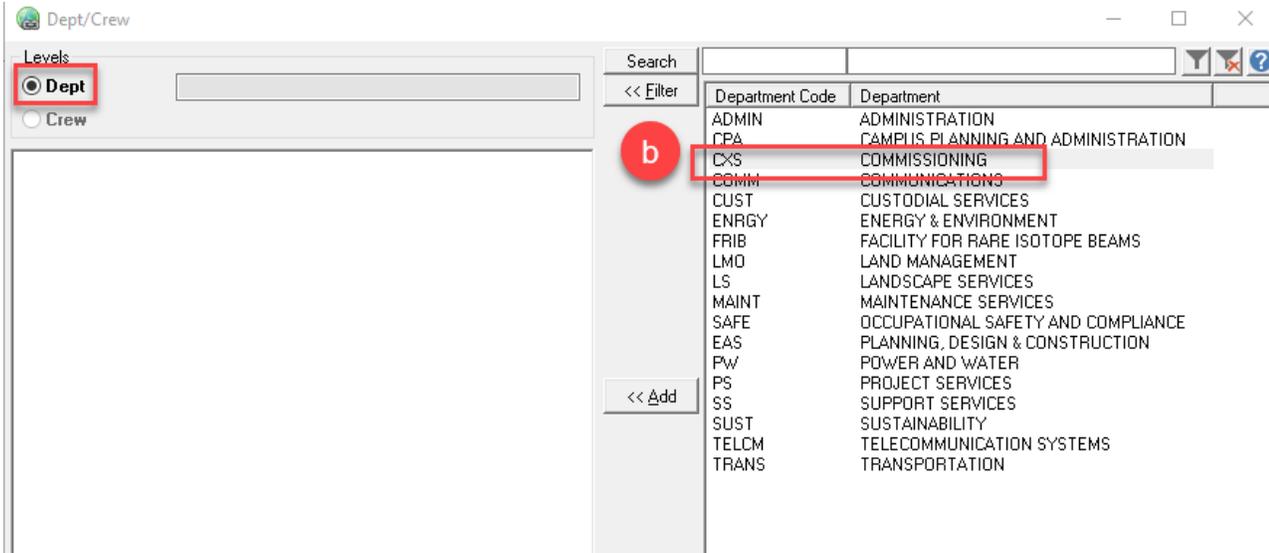
Items: 64

OK Cancel



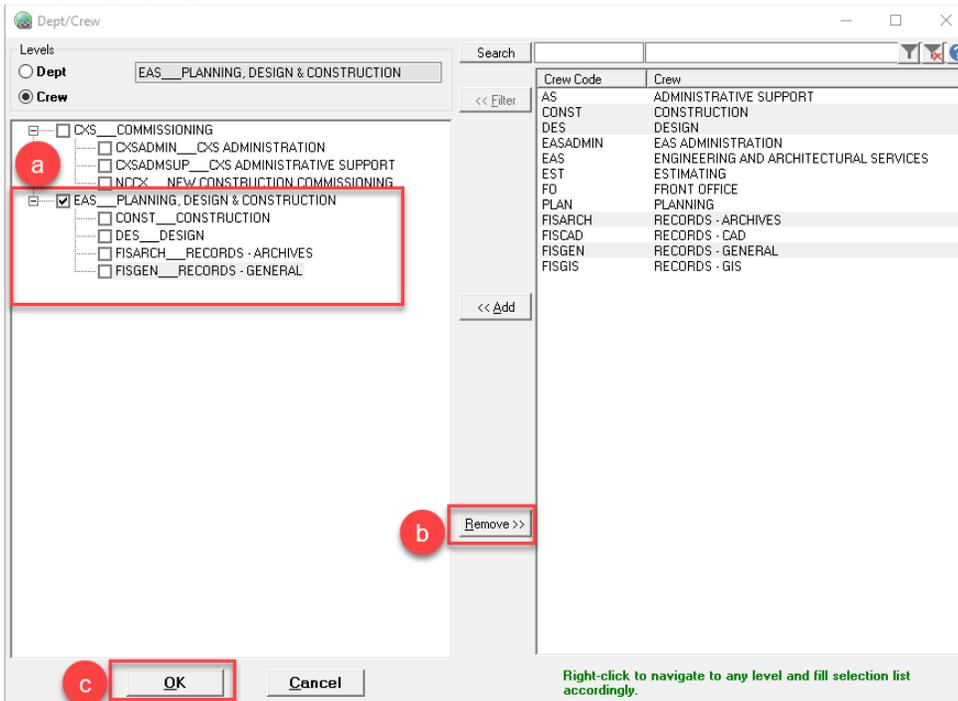
If the file is specific to certain departments/crews:

- Either use the search tool from above instructions and select all the appropriate crews, or
- Double click on a **Dept** to access their crew list.
- Select all the crews** that pertain to that file.
- Click the **Add** button.
- If other departments and crews are needed, click on the **Dept radio button** and repeat steps.
- Pick a **primary crew** by checking the appropriate box (responsible for maintaining the file).
- Click **OK**.



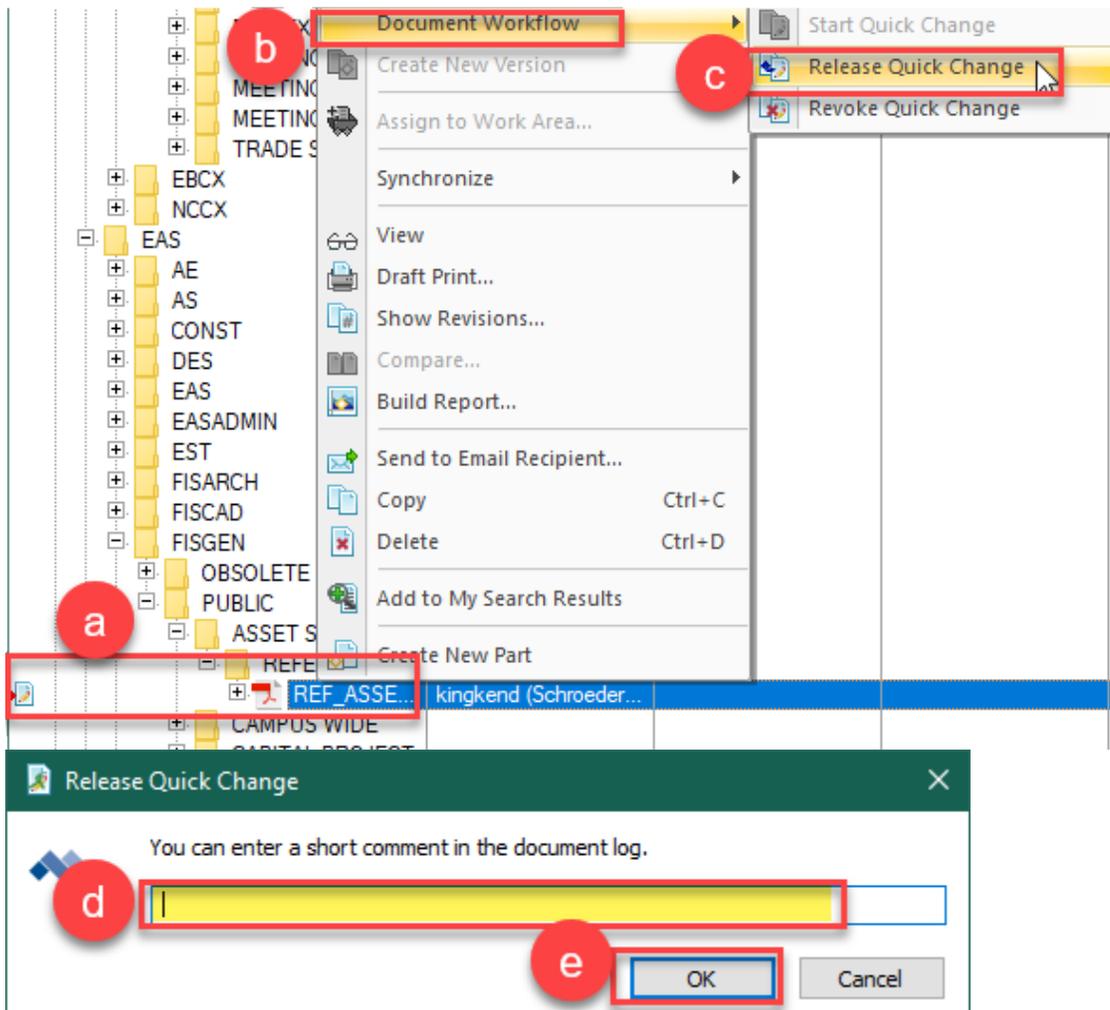
To remove departments/crews:

- a. **Select** them on the left
- b. Click the **Remove** button.
- c. Click **OK**.



*Finish filling in the wizard to describe the file if you haven't already done so.

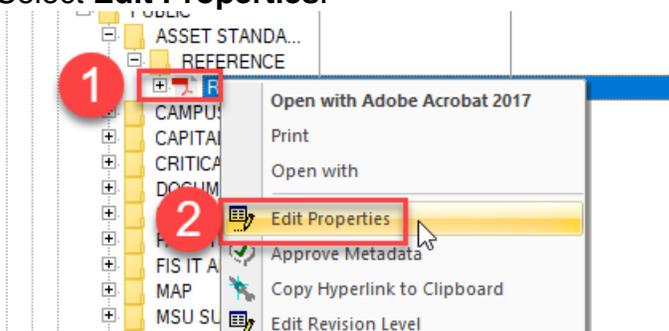
3. Release the Document
 - a. **Right-click** on the document
 - b. Select **Document Workflow**
 - c. Select **Release** or **Release Quick Change**.
 - d. **Enter a comment** about the change.
 - e. Click **OK**.



Editing Properties

To make changes to the information that describes the document, use the 'Edit Properties' function.

1. **Right-click** on the document.
2. Select **Edit Properties**.



3. Update the wizard with the appropriate metadata.
4. Click **Finish**.

Create 'REF_ASSETSTAND_DELETE_ME.pdf' - Enter/Edit Properties

Document Information | Notes

Doc Class REF REFERENCE

Sub Class SETSTAND ASSET STANDARDS

Dept/Crew CXS_COMMISSIONING
CXADMIN_CXS ADMINISTRATION
CXADMSUP_CXS ADMINISTRATIVE SUPPORT
EBCX_EXISTING BUILDING COMMISSIONING
NCCX_NEW CONSTRUCTION COMMISSIONING

Project Type FACULTY READINESS
MAJOR
MINOR
PURCHASE ORDER

Security Level PB PUBLIC

Description DELETE ME please

File Suffix DELETE ME PLEASE

Document Date 11/15/2019

File Name: View

Store as My Defaults

4 Finish Cancel

Meridian may alert you that the change you made will result in the document being renamed or moved, if this message appears, click 'Finish'.

