Infrastructure Planning and Facilities
MICHIGAN STATE UNIVERSITY

**Meridian Active Projects –
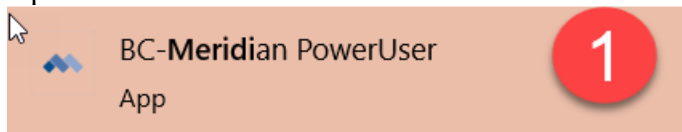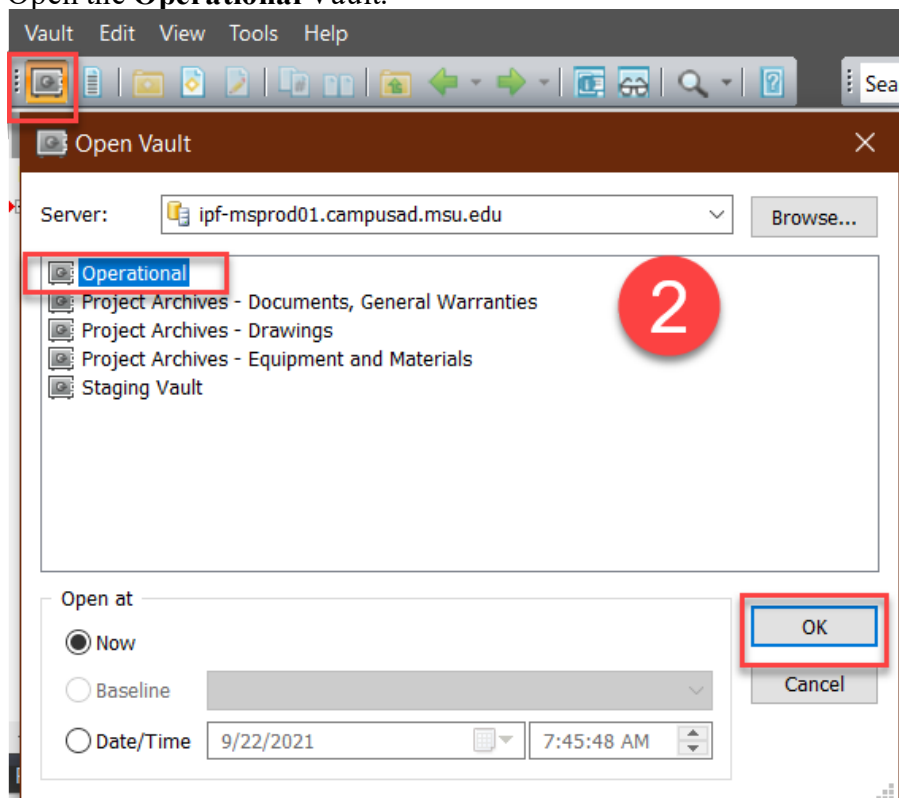EBCX adding files**

Purpose

Instructions for CXS to add their S drive EBCX files into Meridian Active Projects.   Also to instructions to edit properties and some helpful hints for adding files.
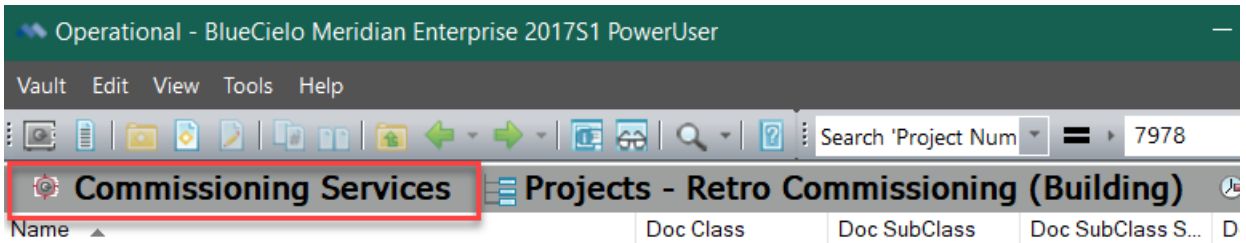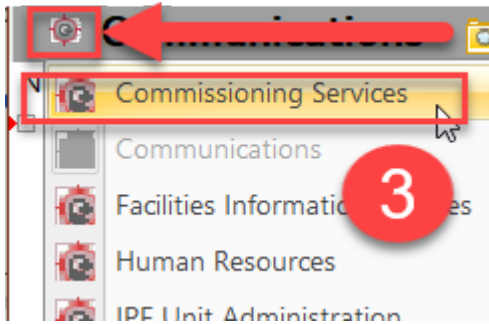
Procedure

1. Open **Meridian**.

2. Open the **Operational** Vault.

3. If it is your first time opening the Operational Vault, select the **Commissioning Services** Scope.
    a. If you aren't in the commissioning services scope, but have already been in the Operational Vault before, click on the scope icon and select Commissioning Services.
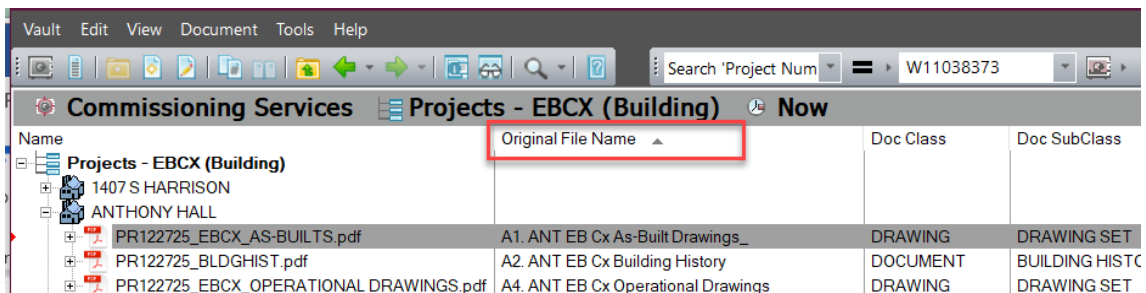
4. Find the Nav View called **Projects – EBCX (building)**
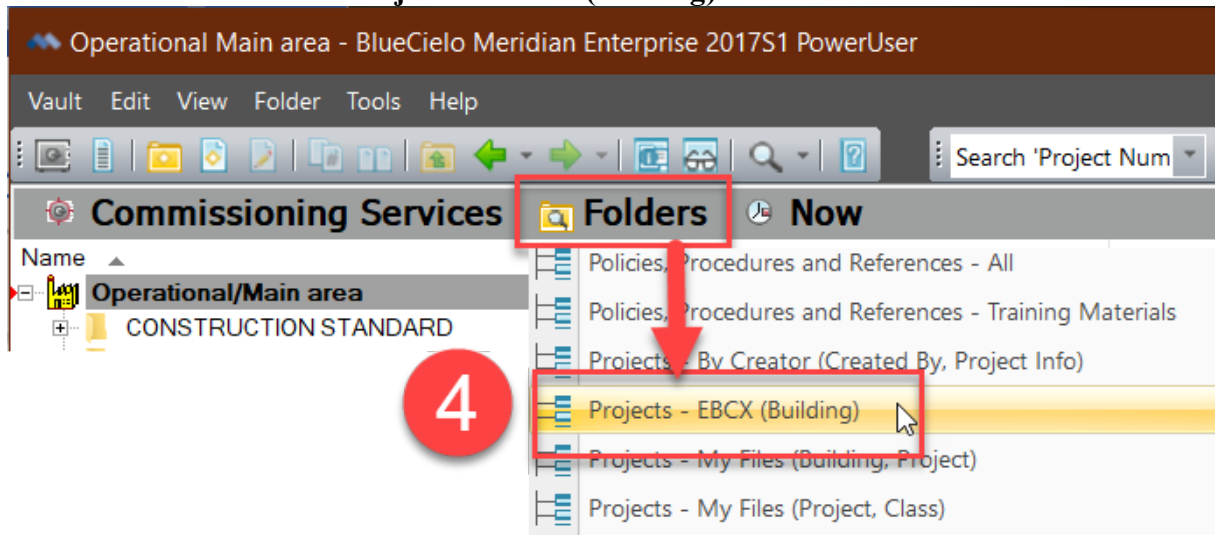
5. Pick a building to work on.

   a. Open the building folder in Meridian you will be adding files to. *If the building isn't listed, it means no files have been added for this building yet from the Commissioning EBCX S drive.* You may want to sort by the Original File Name column so it matches the S drive order.

   b. Navigate to the folder in the S drive that has the files you will be adding to Meridian. *Here is where my expertise is lacking. Some of the folders have different structures and I am not sure if*

Jason wants all the files added or just the pdf from the final report? He will have to tell you, but Meridian can handle all the files if that is what is decided upon.

    c. Select one file that isn't already in Meridian and drag and drop it into Meridian. When you drop, select **As New Document**.
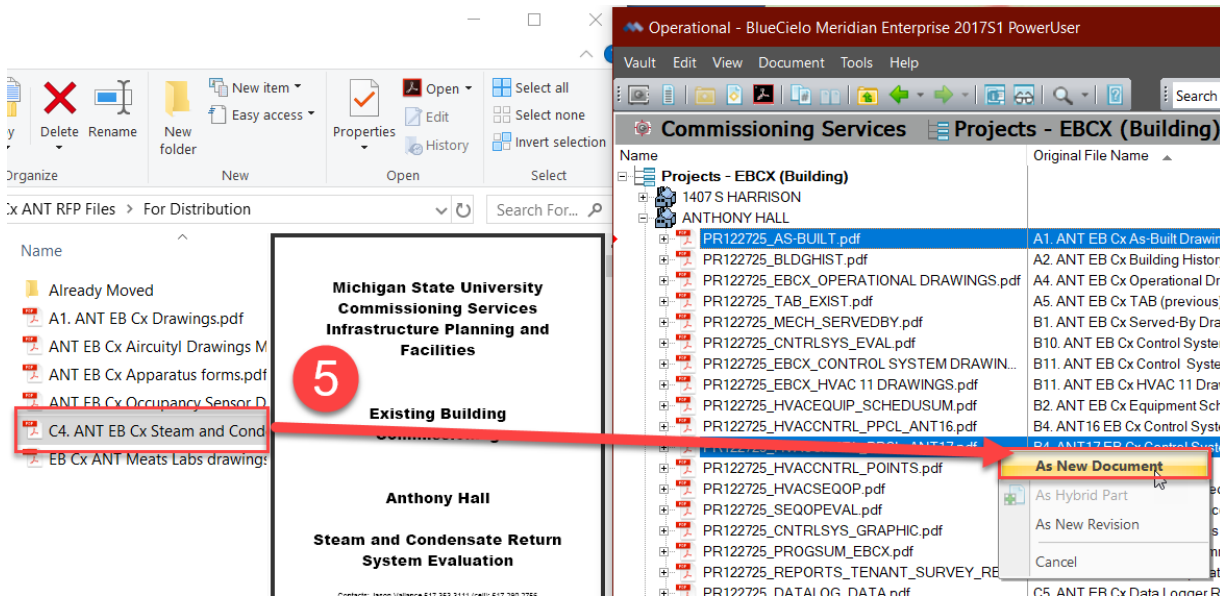
6. Have the excel cheat sheet (T-2017-00039_DOCUMENT_INDEXING_CHEAT_SHEET_2021-08-13) open and find that document type you are adding. This will tell you all the information you will need to index the file in Meridian. I will attach a copy to this and I have put a link here to the file in the S drive. You will use this A LOT!

|	B	C	D	E	F
1	**CXS #**	**CXS Document Name**	**MERIDIAN SUBCLASS**	**MERIDIAN SUBCLASS DETAIL**	**MERIDIAN DESCRIPTION**
26	C1	EB Cx Progress Summary	PROGRESS SUMMARY	EBCX	
27	C2	Space Utilization Report	REPORTS		SPACE UTLIZATION
28	C3	Tenant,Operator Survey Results	REPORTS		TENANT OPERATOR SURVEY RESULTS
29	C4	Steam and Condensate Return System Evaluation	STEAM SYSTEM EVALUATION		
30	C5	Data Loggers	DATA LOGS	DATA LOGGERS	
31	C6	Compressed Air Audit Report	COMPRESSED AIR AUDIT		
32	C7	Vibration Analysis Report	REPORTS		VIBRATION ANALYSIS
33	C8	Documentation Review Log	STATEMENT OF WORK - APPENDIX 4	DOCUMENTATION REVIEW LOG	

7. Select the **Document Type**.
    a. The files will either be **Project Document** or **Project Drawing Set**, reference the cheat sheet and select the correct one and then click **OK.**
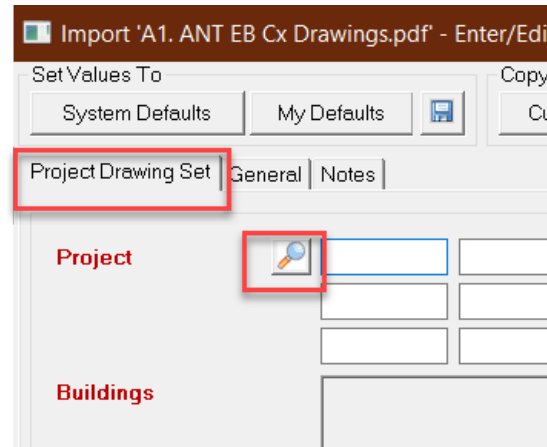
3
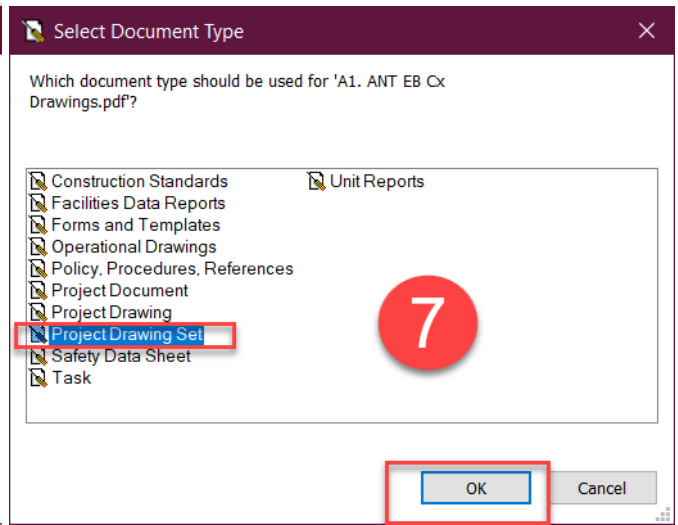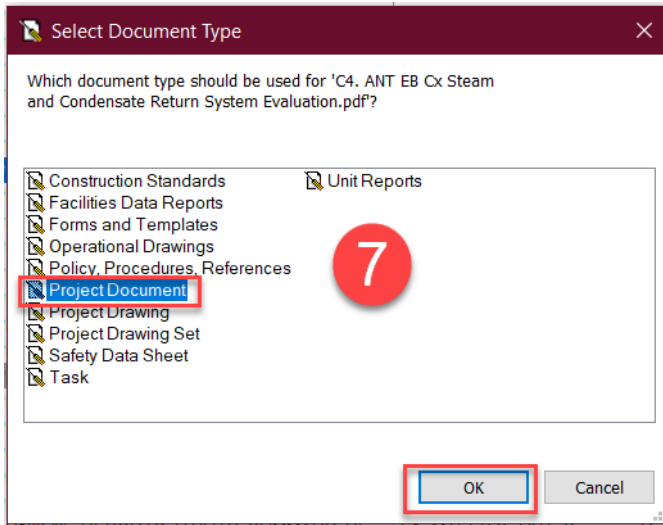
8. Describe the file. Red fields are required. (after doing this once, see helpful hints below for a faster way)
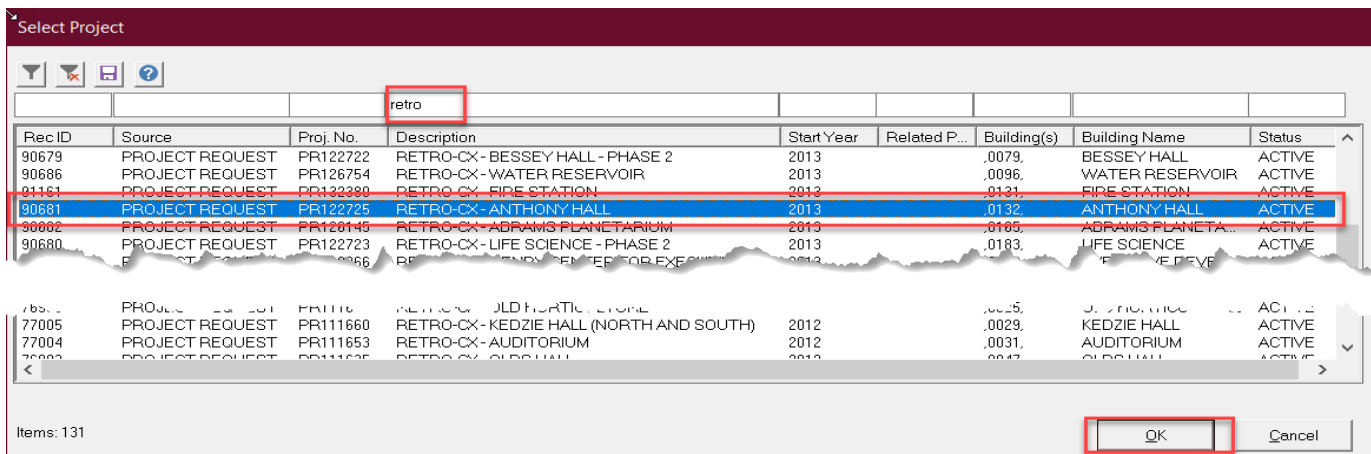
   a. Select a **Project**:

      1. Click on the **magnifying glass** and select the project from the project administration tool. Each EBCX building has a corresponding project.
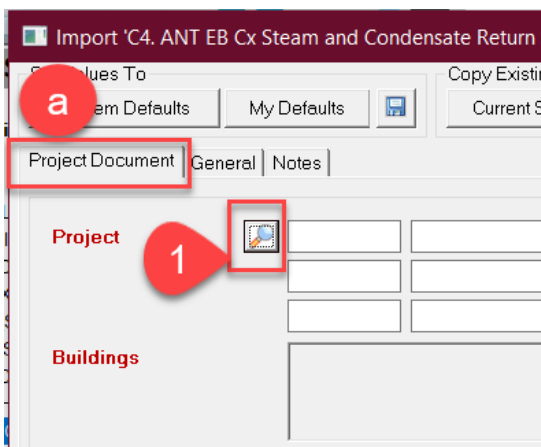
or

- Use the **filter fields** to find the project.
- **Double click on the project or select it and click OK.** If you don't do this, you will have to repeat the step.
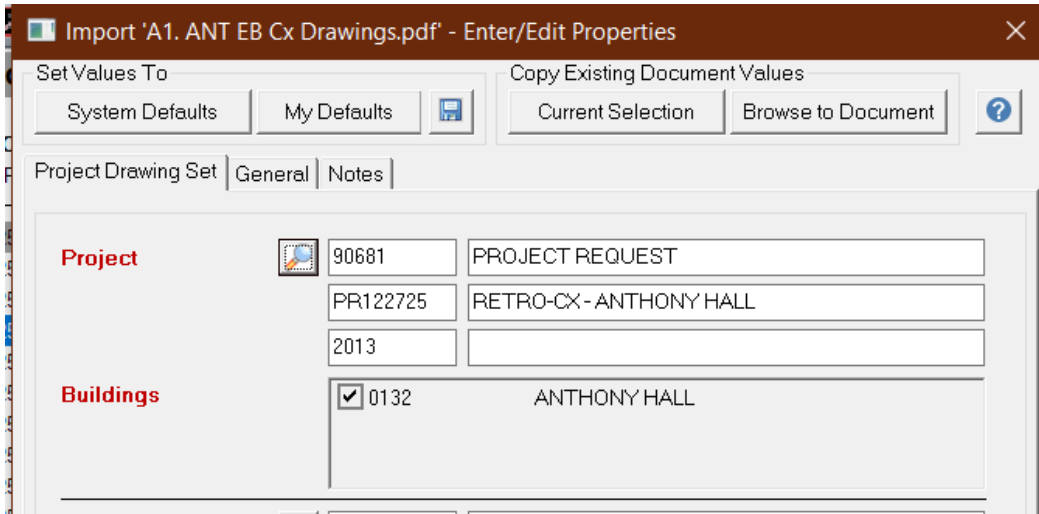
b. **General** Tab

1. **Project Documents - Sub Class** *(reference cheat sheet).* You can type in the field or use the magnifying glass icon to see and filter the entire list. Double click on the correct sub class or click **OK**.
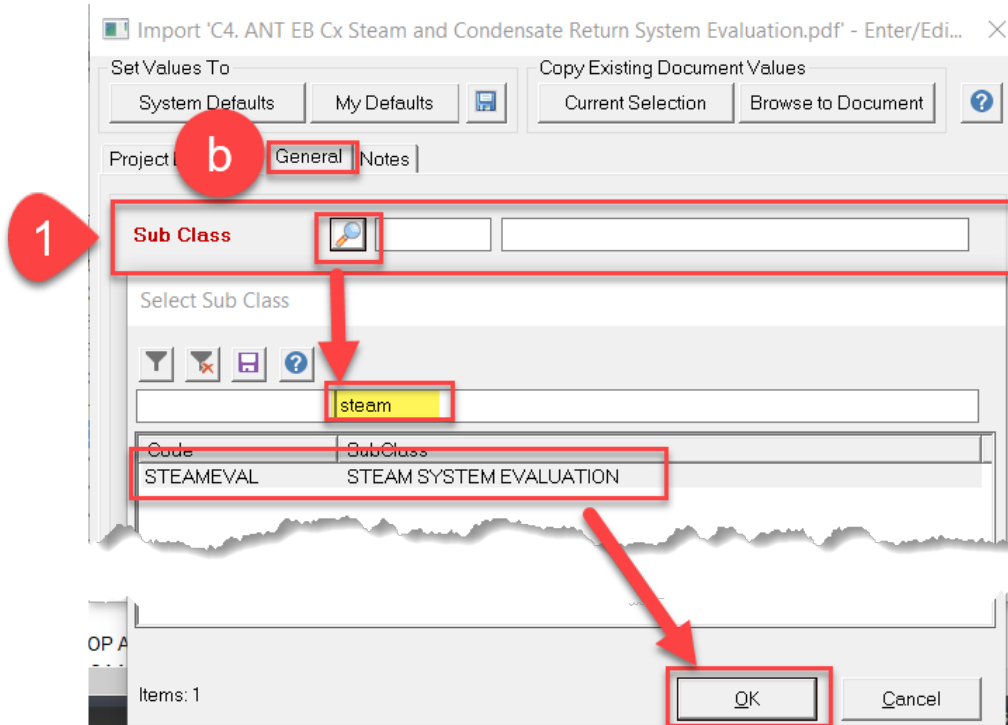
OR

1. **Project Drawings Set- Phase:** Pick or type **EBCX**.
2. **Project Drawings Set- Discipline:** Pick or type **MECHANICAL**.

3. Description is optional and will become part of the Meridian generated file name if filled in. *Reference cheat sheet to see if the description should be filled in or not.*

4. **Originator**: select Internal

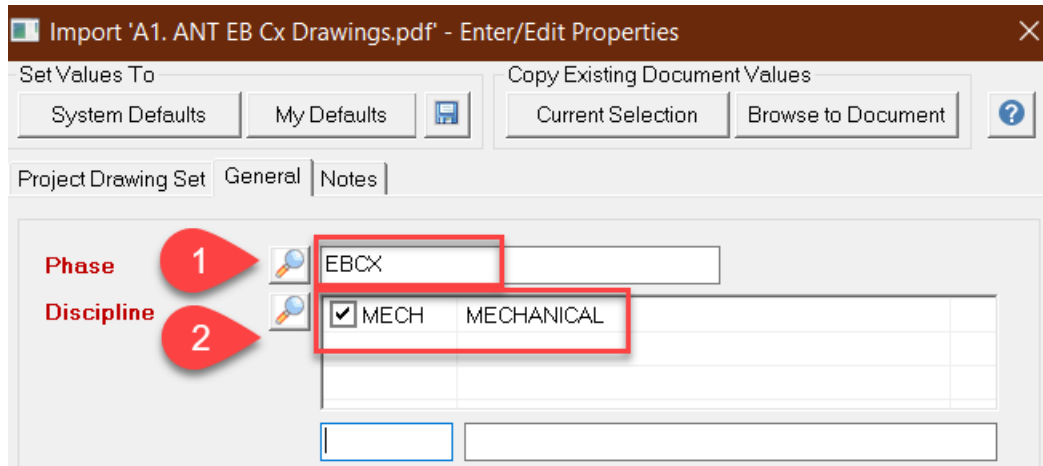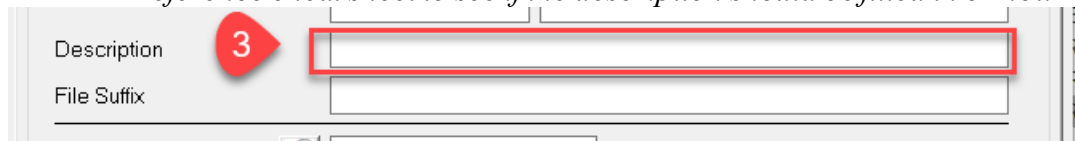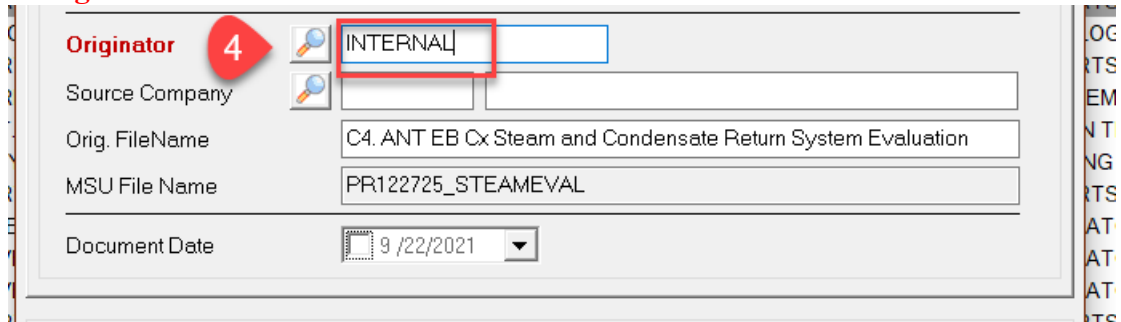9. Check the box for **Delete Source**. This will delete the file from the network drive.
10. Click **Finish**.
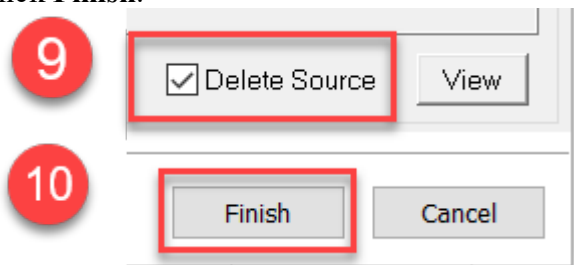
11. **Release** the Document into Meridian. When you add files, they are under a "working" state. You will need to release them into Meridian for them to officially become a file in the system. You can do this one-at-a-time or in bulk (see helpful *hints below for bulk option*)

       a. **Right-click** on the file(s)
       b. Select **Document Workflow**
       c. Select **Release** or **Release Quick Change** *(Meridian says one or the other)*
       d. Hit **OK**
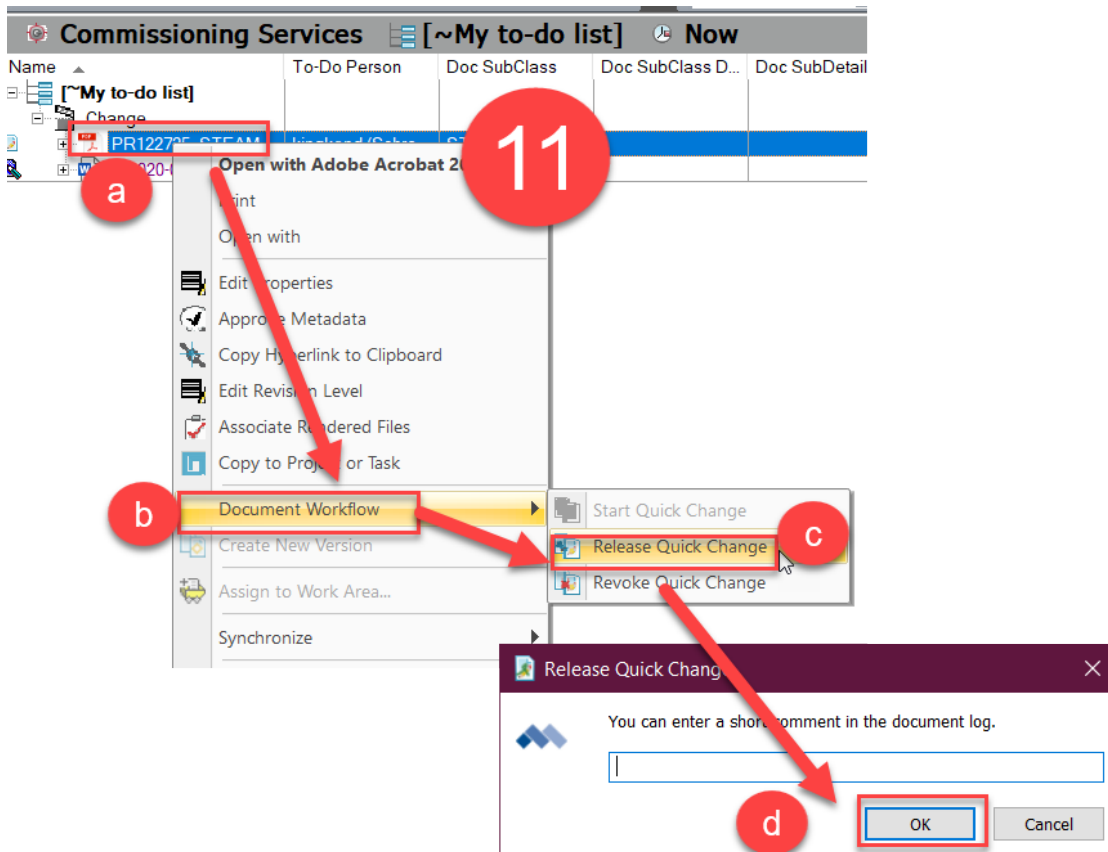
Editing Properties

If you need to change the metadata or fix a typo, you can **right click** on the file and select **edit properties**. The wizard will appear and you can change whatever information needs to be updated, then click **finish**. You may have to click **OK** if a prompt comes up saying the file name is about to change.
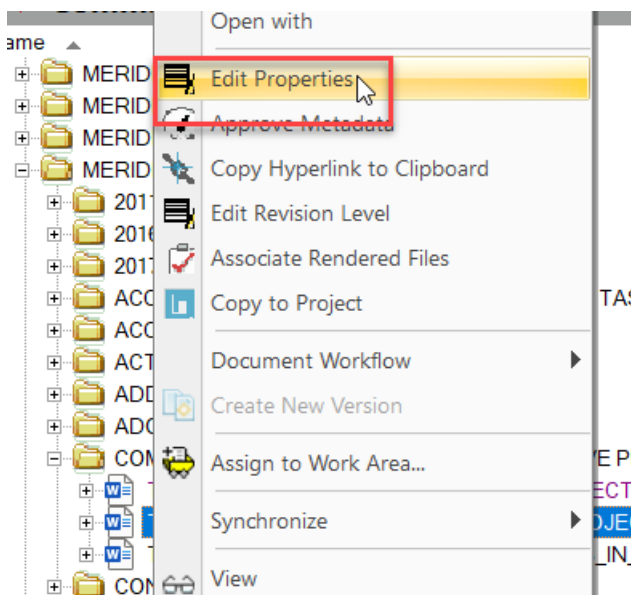
Helpful Hints:

- **RELEASE FILES IN BULK:**
  - To quickly view all the files you have under a quick change that need to be released, you can select the NAV View named **[~My to-do list]**.
  - Then select them all at once and right-click, document workflow, release.
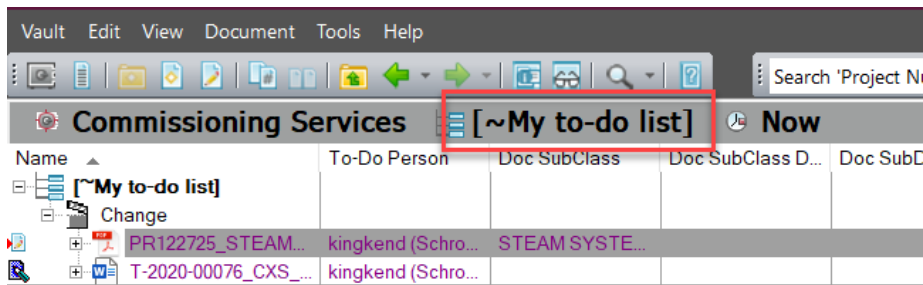
- **ADD MULTIPLE FILES AT ONCE:**
  - Use this only for files that will be the SAME document type in Meridian. Select them from the network drive and drag and drop the whole group into Meridian.
  - Select the document type **Project Document** or **Project Drawing Set** (depending on what you selected) and make sure to **check the box** that 'Use this document type for all…. Files', click **OK**.
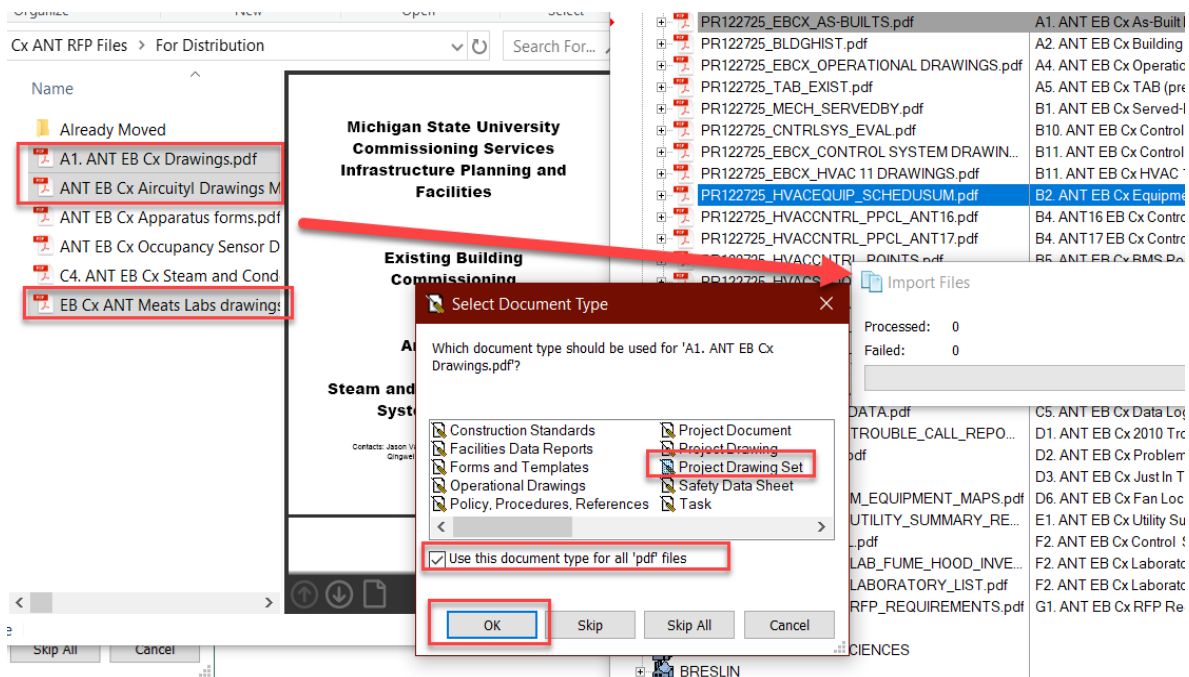
  - If you are adding multiple files at once, <mark>pay very close attention to the top of the add wizard</mark> for which file you are adding. They don't usually add in the same order that they are listed in the network drive. Then use the excel cheat sheet for quick indexing.
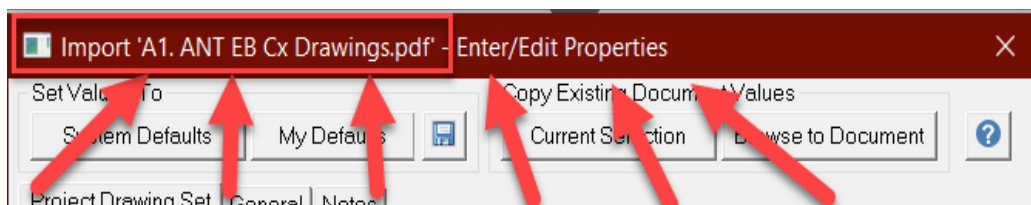
- **'MY DEFAULTS' SETTING: save LOTS of time when adding similar files into Meridian.**
  - o Think about any fields that are going to be the same for each file you are adding (this setting can be changed project to project).
    - ▪ Project Documents: all the project documents for a building will have the same project information and originator. The subclass, subclass detail and descriptions change.
      - Drag and Drop one Project Document file. Select the **project** and the **originator**, then **click the save button** at the top of the wizard to set these as your default settings.
    - ▪ Project Drawing Set: all project drawing sets for a particular building will have the same project, phase, discipline, originator. Only the description changes.
      - Drag and Drop one Project Drawing Set file. Select the **project**, the **phase**, the **discipline** and the **originator**, then **click the save button** at the top of the wizard to set these as your default settings.
  - o Then whenever you add files, click **My Defaults** when the wizard opens, fill out the missing information and click **Finish.**
  - o When you switch to a new building, change the project info for a document and drawings set, and save the new settings.
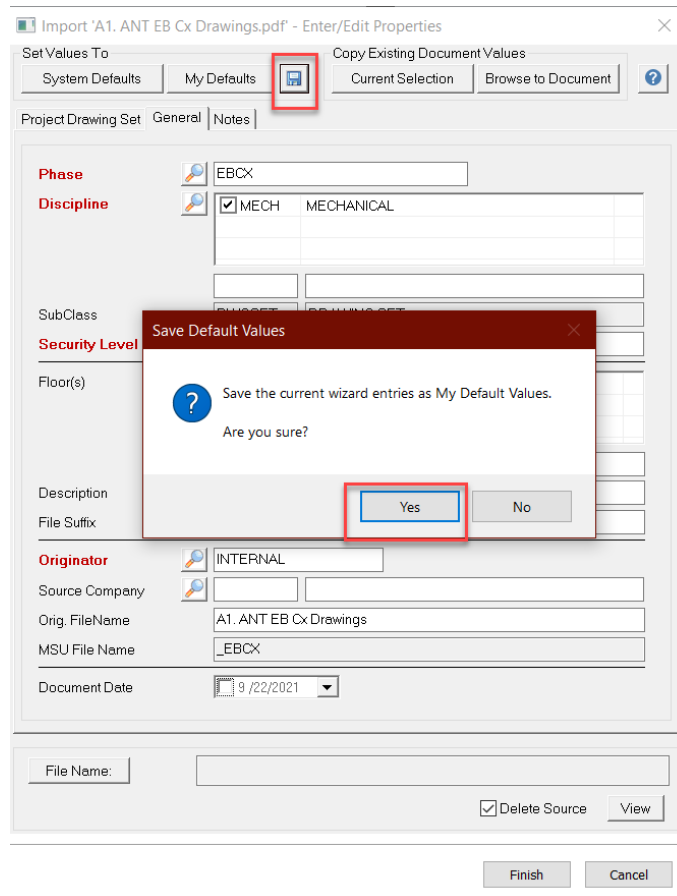
- **'CURRENT SELECTION' SETTING: save time when adding similar files into Meridian. This is similar to My Defaults, but not a saved setting.**
  - o Select a file in Meridian that has the very similar metadata as the file you are about to add to Meridian.

- Drag and Drop the file from the network drive into Meridian, if prompted, select 'as new document', select the document type, then when the wizard appears click **Current Selection**
- This will auto-populate the wizard exactly the same as the file you had selected in Meridian.
- **Make sure to change the fields that need to be changed to reflect the current fie you are adding.**
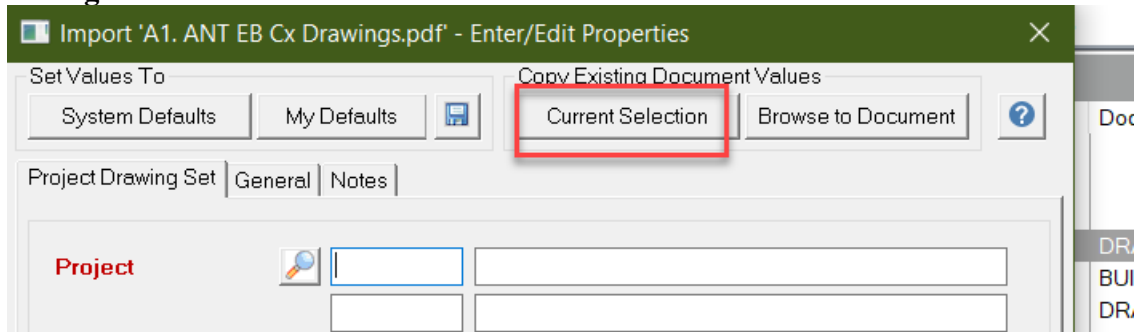
Revision History and Owner of Document

Created: May 2020
Updated: September 22, 2021
FIS Support | fissupport@ipf.msu.edu | 517-353-3434

CXS #	CXS Document Name	MERIDIAN SUBCLASS	SUBCLASS DETAIL(DOCUMENTS)/ PHASE(DRAWING SETS)	MERIDIAN DESCRIPTION
A1	As Builts:	DRAWING SET	EBCX	AS-BUILTS
A1	Original Drawings	DRAWING SET	EBCX	ORIGINALS
A1	Marked Up Drawings	DRAWING SET	EBCX	MARKED UP
A1	Shop Drawings	DRAWING SET	EBCX	SHOP DRAWINGS
A1	Mechanical Schedules	DRAWING SET	EBCX	MECHANICAL SCHEDULES
A2	Building History Report	BUILDING HISTORY REPORT		
A3	Mechanical Submittals	MECHANICAL SUBMITTALS		
A4	OPERATIONAL DRAWINGS	DRAWING SET	EBCX	OPERATIONAL DRAWINGS
A5	TAB REPORT	TEST AND BALANCE REPORT		
A6	Summary Commissioning Report Template	FINAL COMMISSIONING REPORT		
A7	HVAC Eng Studies	STUDY		HVAC Eng Studies
A8	EAS Projects	EAS CAPITAL PROJECT REPORT - MONTHLY		
A9	Energy Conservation Projects	REPORTS		
B1	Served By Drawings	DRAWING SET	SERVED BY DRAWINGS	
B2	HVAC Equipment Scheduling Summary	HVAC EQUIPMENT	SCHEDULING SUMMARY	
B3	CENTRAL CONTROL EQUIPMENT REPORT	REPORTS		CENTRAL CONTROL EQUIPMENT
B4	HVAC Control System Programming (PPCL)	HVAC CONTROL SYSTEM	PROGRAMMING (PPCL)	
B5	HVAC Control System Points List	HVAC CONTROL SYSTEM	POINTS LIST	
B6	HVAC Sequences of Operation	HVAC SEQUENCES OF OPERATION		
B7	HVAC Sequences of Operation	SEQUENCE OF OPERATION EVALUATION		
B8	Trended Controls Points Report	DATA LOGS	TRENDED CONTROLS REPORT	
B9	Control System Graphics	CONTROL SYSTEM	GRAPHICS	
B10	Control System Evaluation Template	CONTROL SYSTEM	EVALUATION	(IF TEMPLATE, DENOTE HERE)
B11	Control Drawings	DRAWING SET	EBCX	
C1	EB Cx Progress Summary	PROGRESS SUMMARY	EBCX	
C2	Space Utilization Report	REPORTS		SPACE UTLIZATION
C3	Tenant,Operator Survey Results	REPORTS		TENANT OPERATOR SURVEY RESULTS
C4	Steam and Condensate Return System Evaluation	STEAM SYSTEM EVALUATION		
C5	Data Loggers	DATA LOGS	DATA LOGGERS	
C6	Compressed Air Audit Report	COMPRESSED AIR AUDIT		
C7	Vibration Analysis Report	REPORTS		VIBRATION ANALYSIS
C8	Documentation Review Log	STATEMENT OF WORK - APPENDIX 4	DOCUMENTATION REVIEW LOG	
C9	General Observation Log	STATEMENT OF WORK - APPENDIX 4	GENERAL OBSERVATION LOG	
D1	Trouble Call Report	REPORTS		TROUBLE CALLS
D2	Problem Report Summary	REPORTS		PROBLEM REPORT
D3	JIT Deficiency Report or Deferred Maintenance Report	JUST IN TIME LIST		
D4	Equipment and PM Activity	BUILDING SYSTEMS O&M		EQUIPMENT AND PM ACTIVITY
D5	Equipment and PM Maps	BUILDING SYSTEMS O&M		EQUIPMENT AND PM MAPS
D6	Roofing and Masonry PM Report	REPORTS		ROOFING AND MASONRY
E1	Utility Summary Report	REPORTS		UTILITY SUMMARY
E2	Cost of Utilities Report	COST OF UTILITIES		
E3	Integrated Energy Performance Model Report	REPORTS		INTEGRATED ENERGY PERFORMANCE MODEL
F1	Fume Hood Ratings Report	FUME HOOD RATINGS REPORT		
F2	Laboratory Device Inventory	LABORATORY DEVICE INVENTORY		
F3	Laboratory Control Evaluation	LABORATORY CONTROL EVALUATION		
F4	Laboratory Pressurization Report	REPORTS		LABORATORY PRESSURIZATION
G1	Technical Requirements Standard	PROFESSIONAL SERVICES SELECTION		
G2	Internal Correspondence	CORRESPONDENCE		Internal
G3	Standard Reporting Template (appendix 4)	STATEMENT OF WORK - APPENDIX 4	STANDARD REPORTING TEMPLATE	