

# MERIDIAN DOCUMENT MANAGEMENT SYSTEM

## Project Archives — Equipment and Materials Vault

This manual includes step by step instructions for editors in the project archives—equipment and materials vault in Meridian.

The screenshot displays the Meridian Document Management System interface. The main window is titled "Equipment ID (Building-Division-SubDivision)" and shows a tree view of project locations. The selected location is "CP11213\_OM\_MECH...". The table below shows the equipment details for this location:

Name	Equipment ID Primary	Equipment Division
AKERS HALL		
ANGELL UNIV SERVICES		
ANTHONY HALL		
AUDITORIUM		
BEEF CATTLE RESEARCH-MA...		
BERKEY HALL		
BIO ENGINEERING		
BIOCHEMISTRY		
BIOMEDICAL PHYSICAL SCIE...		
BRESLIN		
<No Value>		
MECHANICAL		
<No Value>		
HEATING VENTILATIO...		
CP11213_OM_MECH...	SA006900040K001	MECHANICAL
CP11213_WTY_MECH...	SA006900040K001	MECHANICAL
CP13114_OM_MECH...	EQ037004	MECHANICAL
PR072595_OM_MECH...	0069-HVACEF-22	MECHANICAL
SITE CONSTRUCTION		
BROAD ART MUSEUM		
BRODY HALL		
BUSINESS COLLEGE		
CAMPBELL HALL		
CASE HALL		
CENTER INTEGRATIVE PLAN...		
CENTRAL CONTROL		
CENTRAL SERVICES		
CHEMISTRY		
CHILDREN'S GARDEN - REST...		
CLINICAL CENTER-ANIMAL		
CLINICAL CENTER-CLINIC		
CLINICAL CENTER-OFFICE/LAB		
COMMUNICATION ARTS		
COMPUTER CENTER		
CONRAD HALL		
COWLES HOUSE		
CROP SCIENCE-FIELD LAB		
DUFFY DAUGHERTY-SAAC		
ELECTRICAL DISTRIBUTION		
ENG RESEARCH COMPLEX		
ENGINEERING		
ERICKSON HALL		
FARRALL HALL		
FEE HALL		
FOOD SCIENCE		
FOOD STORES		
FRIR		

The "Properties" window shows the "Equipment Details" for the selected equipment:

- Equipment: SA006900040K001 - SPLIT A/C - 1 (INUSE)
- Eqp. Desc.: SPLIT A/C - 1
- Model: MC#96A
- Manufacturer(s): LIEBERT
- Manufacturer Group: LIEBERT

The "Viewer" window shows a 3D model of the equipment, titled "CP11213\_OM\_MECH\_HVAC\_HUMIDCNTRL\_TEMPERATURE\_AND\_HUMIDITY\_CONTR\_2013-". The model is a Liebert EMERSON unit.

MICHIGAN STATE UNIVERSITY

Facilities Information Services  
Infrastructure Planning & Facilities  
1147 Chestnut Rd, Room 101  
Michigan State University  
East Lansing, MI 48824-1215

For Assistance contact :  
FIS Support  
(517) 353-3434  
fissupport@ipf.msu.edu  
fissupport.ipf.msu.edu

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## 1 Equipment and Materials

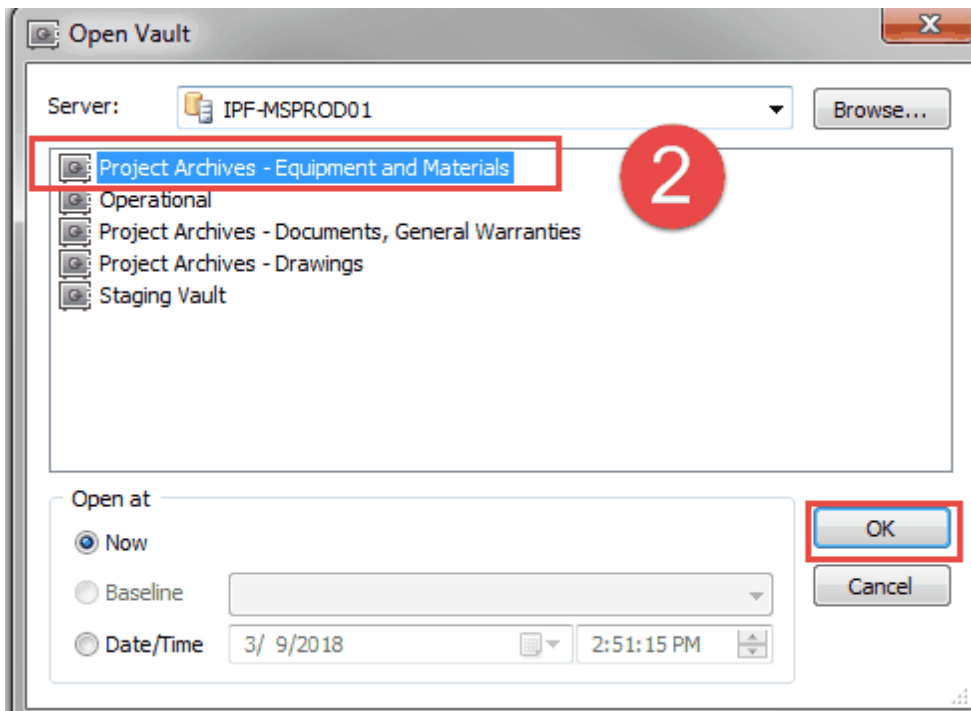
The Equipment and Materials (EAM) information is located in the **Project Archives - Equipment and Materials** vault in Meridian. A select group of individuals have permissions to add and modify the files in the Equipment and Materials vault. The information stored is about the assets, equipment and materials for the facilities and land entities located at Michigan State University.

### The Equipment and Material types stored in the vault are:

- Shop Drawings (submittals, product data)
- Operation and Maintenance Manuals
- Manufacturer Warranties
- Testing and Readings
- PM Scheduling
- Service and Maintenance

## 2 Accessing the EAM vault

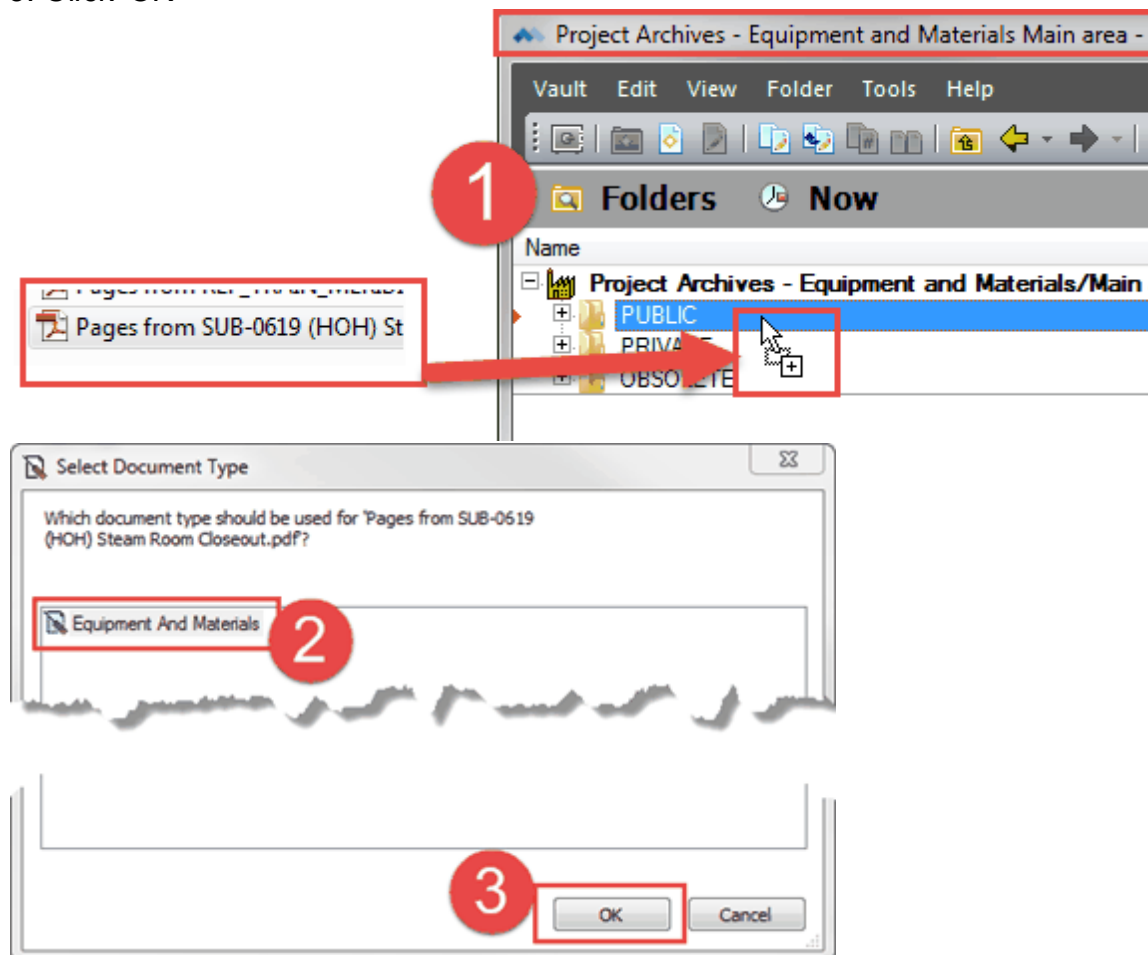
1. Open Meridian.
2. Open the Project Archives - Equipment and Materials vault.



### 3 Adding an EAM file

- **Only add Searchable PDF/A files to the archive vaults.** Ensure the document is the correct format:
  - If you scanned it using Kodak, your scanner should be set up to automatically create these types of files (see the '**Kodak Capture Pro Software Set-up**' instructions in Meridian).
  - If the file was created electronically, you will have to run the 'OCR' and 'Preflight' tools in Adobe Acrobat (see the '**Searchable PDF/A Files**' training manual in Meridian).
  - Make sure you have **Adobe Acrobat** installed on your machine. Foxit will not work.
- **If the file has multiple Equipment IDs associated to it, only add one file per manufacturer/model.** If those fields are different, split the file and add to Meridian separately.


1. Drag and Drop the file into the Project Archives - Equipment and Materials vault.
2. Select 'Equipment and Materials'
3. Click 'OK'



### 3.1 Describe the Document

- The dialog box that pops open is called the Wizard.
- Fill in the Wizard with the appropriate metadata.
- Make sure you fill in all the required tabs of information.

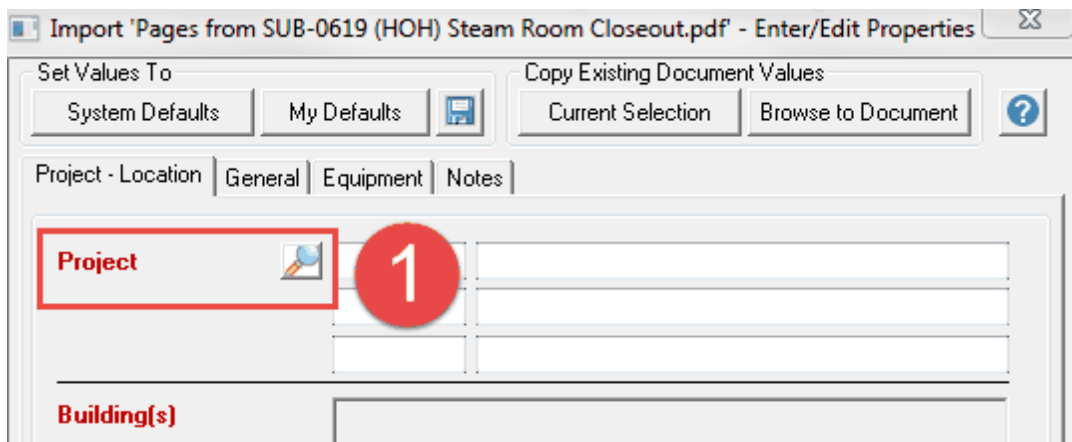


- Use the magnifying glass icons (  ) to access lists of values.
- Depending on the Sub Class (type of document), some of the fields on the General tab may be different.
- Red fields are required
- Black fields are optional.

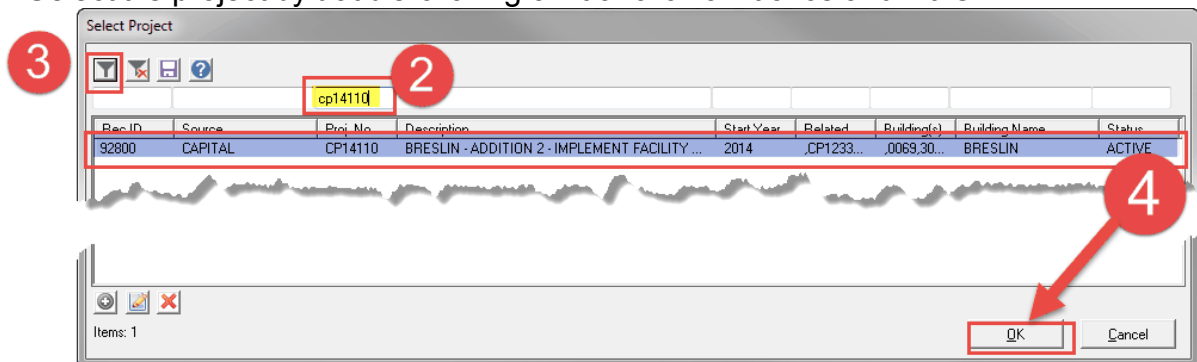
#### 3.1.1 Project-Location tab

1. Select the **Project** by clicking on the magnifying glass icon.

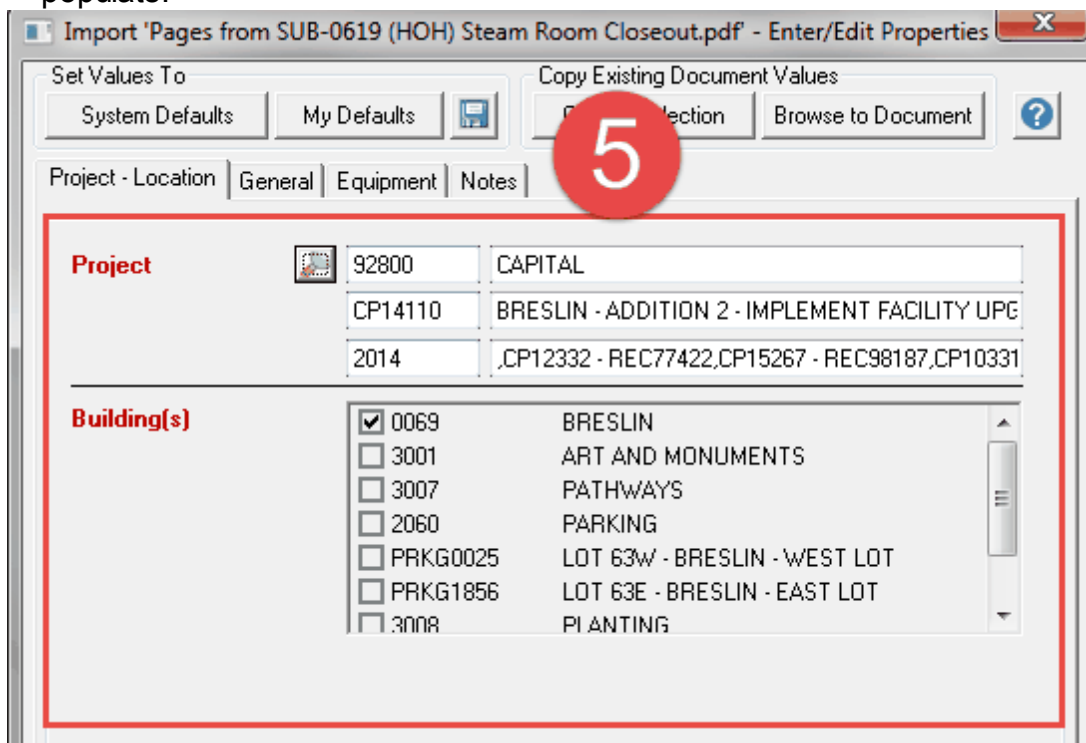
**\*\*\*You CANNOT type in these fields, you have to select the project from the project database.\*\*\***



2. In the project selection tool, type in the filter boxes to find the project (number is probably easiest).
3. Press 'Enter' on your keyboard or click on the filter icon.
4. Select the project by double-clicking on it or click on it once and hit 'OK'.



5. Once you pick the project, all the related project and location information will auto-populate.



### 3.1.2 General tab

1. Click on the '**General**' tab.
2. Select the **Sub Class** from the list of values or type it in and select it.
  - a. If you select Shop Drawing - You will need to fill out the bottom required fields of the General tab.

Import Pages from SUB-0619 (HOH) Steam Room Closeout.pdf - Enter/Edit Properties

Set Values To: System Defaults My Defaults Copy Existing Document Values: Current Selection Browse to Document

Project - Location: **General** Equipment Notes

**Doc Class**: EM EQUIPMENT AND MATERIALS

**Sub Class**: SHOP SHOP DRAWING

**Security Level**: PB PUBLIC

Document Date: 3/9/2018

Source Company: [Empty]

**Submittal Status**: APPROVED

**Submittal Date**: 3/1/2018

**Return Date**: 3/9/2018

Sheet Number: [Empty]

Sheet Description: [Empty]

- b. If you select any of the other Sub Classes, you will only need to fill out the Document Date.

Import Pages from SUB-0619 (HOH) Steam Room Closeout.pdf - Enter/Edit Properties

Set Values To: System Defaults My Defaults Copy Existing Document Values: Current Selection Browse to Document

Project - Location: **General** Equipment Notes

**Doc Class**: EM EQUIPMENT AND MATERIALS

**Sub Class**: OM O&M MANUAL

**Security Level**: PB PUBLIC

**Document Date**: 3/9/2018

Source Company: [Empty]

### 3.1.3 Equipment tab

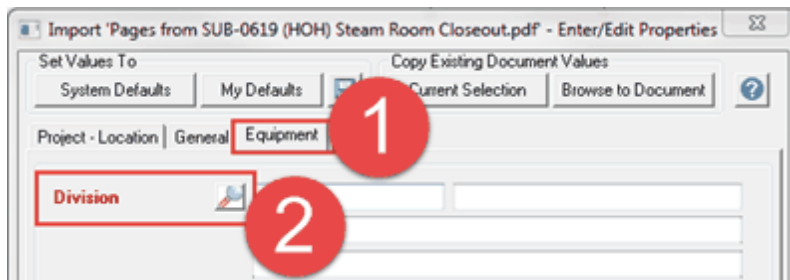
Open the **Equipment** tab to index the specific information about the equipment or material the document is about.

#### 3.1.3.1 Division

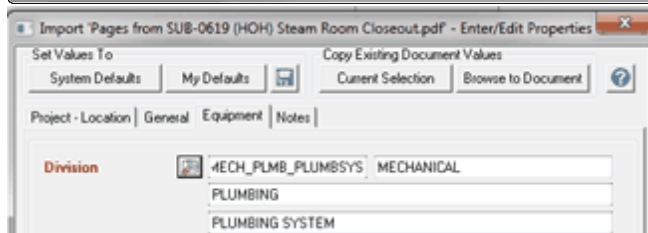
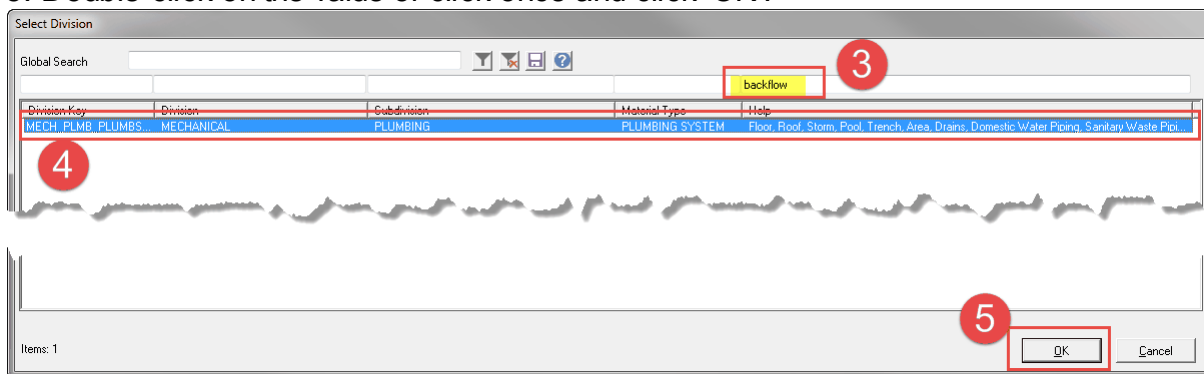
##### Division

The **Division** field is an internal list of the Division, SubDivision and Equipment and Material Types that we have created for the document management system. We have compiled this from archiving all the different types of product data over the life of the university. We use a combination of CSI Master Format, UniFormat and our own historical index of construction standards. The list is maintained by FIS. If there are missing values, please let us know so they can be added (fissupport@ipf.msu.edu).

1. Select the **Division** by clicking on the magnifying glass icon. You should **NOT** type in these fields.



3. You can filter on any field, but using the **HELP** column to search for a keyword might be easiest.
4. If the correct value comes up, select it.
5. Double-click on the value or click once and click 'OK'.





### 3.1.3.2 Equipment

#### Equipment

This is where you can associate documents to the FAMIS Equipment ID. If there is an Equipment ID or multiple IDs, select them and the rest of the wizard will auto-populate with the information from the FAMIS table. If there is not an equipment ID, skip to the Equip. Description field. Equipment is not a required field since not all equipment and materials have a FAMIS Equipment ID assigned.

#### 3.1.3.2.1 Equipment ID

**Remember, if you have multiple Equipment IDs for a document, they should all have the same manufacturer and model.**

1. Click on the magnifying glass icon next to Equipment.

2. Select all the Equipment IDs associated to the document.

3. Click 'OK'.

Number	Description	Manufactures	Model	Keyword	Type	Group	Asset Class	Status	Building
0029-WBSCRUB-6	WALK BEHIND AUTO SCRUBBER (11-057)	TASKI	12558	SCRUBBER	CLEANING	CUSTODIAL		INUSE	0069
0065-RESIN-OR...				BLDG DOCK	27YDROC	ORWM	CONTAINERS	REMOVED	0069
0069A	ABSORPTION MACHINE - 1	TRANE	ABSC08C41 H1...	CHIL ABSO	COOL SYS	ABSORPTION	ABSORBERS	REMOVED	0069
0069-ABSORP-01	ABSORPTION MACHINE - 1	TRANE	ABSC08C41 H1...	CHIL ABSO	COOL SYS	ABSORPTION	ABSORBERS	REMOVED	0069
0069-AIRCOM-01	CONTROLLED AIR COMPRESSOR - CAC1			COMP CNTRL	COMPRESSOR	PUMP/AIR	AIR COMPRES...	INUSE	0069
0069-AIRCOM-02	CONTROLLED AIR COMPRESSOR - CAC2			COMP CNTRL	COMPRESSOR	PUMP/AIR	AIR COMPRES...	INUSE	0069
0069-AIRCOM-03	DRY FIRE SYSTEM AIR COMPRESSOR - 3			COMP SUPP	COMPRESSOR	PUMP/AIR	AIR COMPRES...	INUSE	0069
0069-AITS-1	AUTOMATIC TRANSFER SWITCH	SAC ELECTH		ATS	ELEC SERVE	ELEC SYS	AUTOMATIC T...	INUSE	0069
0069-8CKFLW-048	BACKFLOW PREVENTER - 048	WATTS	909	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	INUSE	0069
0069-8CKFLW-049	BACKFLOW PREVENTER - 049	WATTS	909	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	INUSE	0069
0069-8CKFLW-050	BACKFLOW PREVENTER - 050	HERSEY	FRP - II	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	REMOVED	0069
0069-8CKFLW-051	BACKFLOW PREVENTER - 051	WATTS	909	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	INUSE	0069
0069-8CKFLW-052	BACKFLOW PREVENTER - 052	WATTS	909	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	INUSE	0069
0069-8CKFLW-276	BACKFLOW PREVENTER - 276	ZURN	975-XL	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	INUSE	0069
0069-8CKFLW-437	BACKFLOW PREVENTER - 437	ZURN	975-XL	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	INUSE	0069
0069-8CKFLW-521	BACKFLOW PREVENTER - 521	WATTS	909	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	INUSE	0069
0069-8CKFLW-969	BACKFLOW PREVENTER - 969	ZURN	975-XL	RPZ BF	PLUM BKFL	PLUMBING	BACKFLOW PR...	INUSE	0069
0069-8PCVAC-1	BACKPACK CARPET VACUUM - 1 (99-004)	N AMER	RSV200	VAC-BPC	CLEANING	CUSTODIAL	CLEANING	INUSE	0069
0069-8PCVAC-2	BACKPACK CARPET VACUUM - 2 (04-004)			VAC-BPC	CLEANING	CUSTODIAL	CLEANING	SALVAGE	0069
0069-BUFFER-2	BUFFER - 2 (002215)	NSS	MAVERICK	BUFFER	CLEANING	CUSTODIAL	CLEANING	INUSE	0069
0069-BUFFER-3	BUFFER - 3 (002206)	NSS	MAVERICK	BUFFER	CLEANING	CUSTODIAL	CLEANING	INUSE	0069
0069-BUFFER-4	BUFFER - 4 (002204)	NSS	MAVERICK	BUFFER	CLEANING	CUSTODIAL	CLEANING	INUSE	0069
0069-BUFFER-5	BUFFER - 5 (002203)	NSS	MAVERICK	BUFFER	CLEANING	CUSTODIAL	CLEANING	INUSE	0069
0069-BUFFER-6	BUFFER - 6 (001969)			BUFFER	CLEANING	CUSTODIAL	CLEANING	INUSE	0069
0069-BUILDING	BRESLIN CENTER			BUILDING	BUILDMAINT	BUILD SYS		INUSE	0069
0069-CARPFAN-1	CARPET FAN - 1 (04-069)	AIR KING		CARPET FAN	CLEANING	CUSTODIAL	CLEANING	INUSE	0069
0069-CARPFAN-2	CARPET FAN - 2 (16703)			CARPET FAN	CLEANING	CUSTODIAL	CLEANING	INUSE	0069
0069-COVAC-3	CANISTER CARPET VACUUM - 3 (002200)	NSS	BPC	VAC-BPC	CLEANING	CUSTODIAL	CLEANING	INUSE	0069

4. The rest of the fields will auto-populate from FAMIS.
  - a. If you change anything in these fields, the files will no longer update with changes from FAMIS.
5. If this is correct, click 'Finish'.

The screenshot displays a software interface for adding an EAM file. It is divided into two main sections: a top section for equipment selection and a bottom section for file naming and options.

**Top Section:**

- Equipment List:** A list of equipment items under the heading "PLUMBING SYSTEM". The first item, "0069-BCKFL... BACKFLOW PREVENTER - 048", is selected with a checkmark. A red circle with the number "4" is placed over this list.
- Equipment Details:** Below the list, fields for "Equip. Description", "File Suffix", "Manufacturer", and "Model" are populated with data from the selected item. A red box highlights these fields, and a red circle with the letter "a" is placed over them. A red arrow points from this box to the right.
- Right Panel:** A separate panel on the right shows the same fields, but the "Equip. Description" field is highlighted in yellow and contains the text "BACKFLOW PREVENTERS".

**Bottom Section:**

- File Name:** A text input field for the file name.
- Options:** Two checkboxes are present: "Enforce Naming Standard?" (checked) and "Delete Source" (checked). A "View" button is located to the right of the "Delete Source" checkbox.
- Buttons:** At the bottom right, there are two buttons: "Finish" and "Cancel". The "Finish" button is highlighted with a red box, and a red circle with the number "5" is placed over it.

## 3.1.3.2.2 No Equipment ID

If the document you are adding does not associate to an Equipment ID, go to the Equipment Description field.

1. Fill in an 'Equipment Description'. File Suffix will automatically fill in.
2. Select the 'Manufacturer' from the list. If the manufacturer is not in the list, contact FIS support and we will add it.
3. Fill in the 'Model' if applicable.
4. Click 'Finish'.

PLUMBING SYSTEM

Equipment

1

Equip. Description piping

File Suffix PIPING

2

Manufacturer CHARLOTTE PIPE AN... CHARLOTTE PIPE AND FOUNDRY

3

Model

File Name:

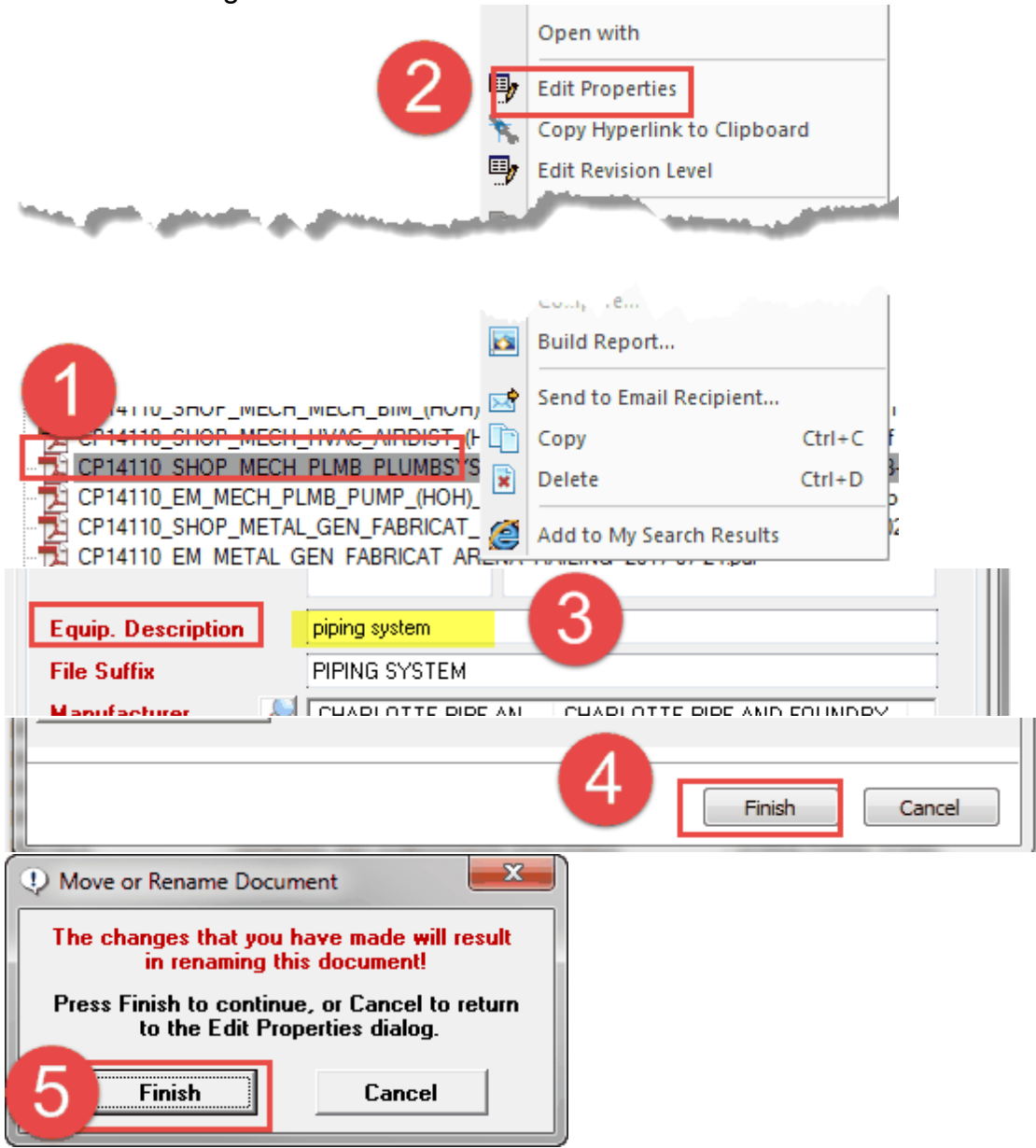
Enforce Naming Standard?  Delete Source View

4

Finish Cancel

## 4 Editing Properties

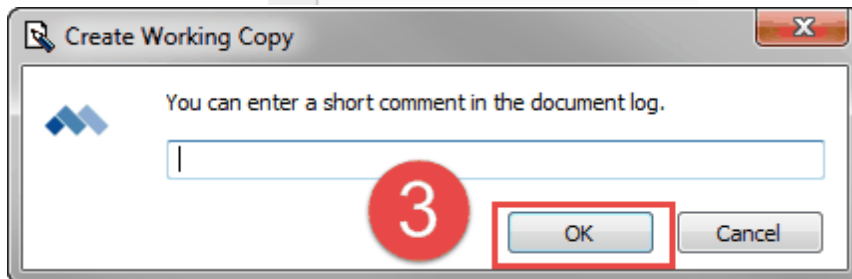
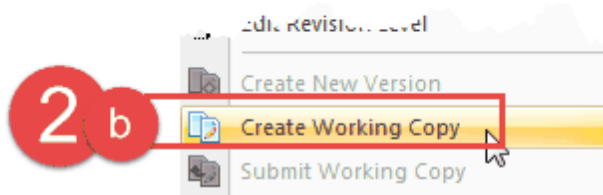
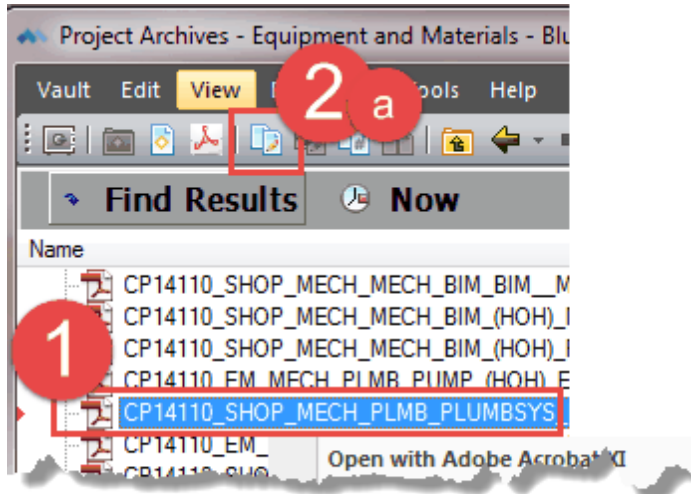
- To change the metadata on a file:
1. Right click on the file.
  2. Select 'Edit Properties'.
  3. Make your changes (If the 'Equipment Description' is being changed, when you finish typing, clear the 'File Suffix' field, then click in the Equipment Description field and click one of the arrow keys on your keyboard).
  4. Click 'Finish'
  5. Click 'Finish' again.



## 5 Modifying/Replacing Document Contents

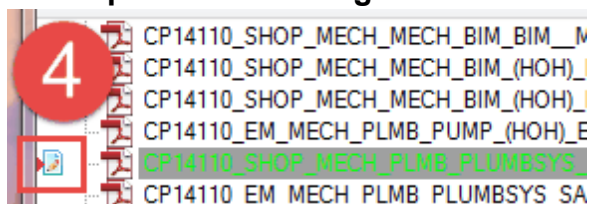
To change the content of a file:

1. Select the file.
2. Create a 'Working Copy' by either...
  - a. Click the 'Create Working Copy' icon.
  - b. Or, right click and select 'Create Working Copy'.
3. Click 'OK'.



### 4. Decision time:

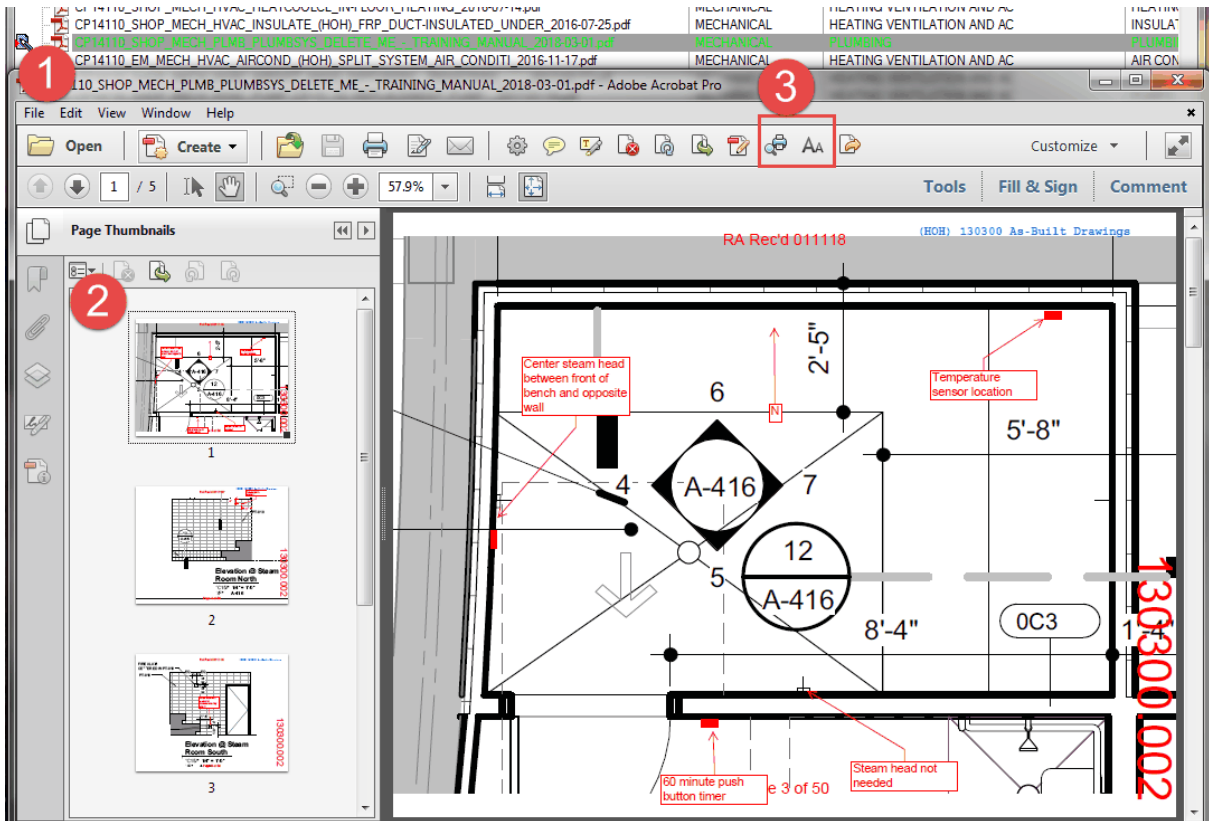
- Modify the existing document by adding or removing pages.
- Replace the existing document with a new one.



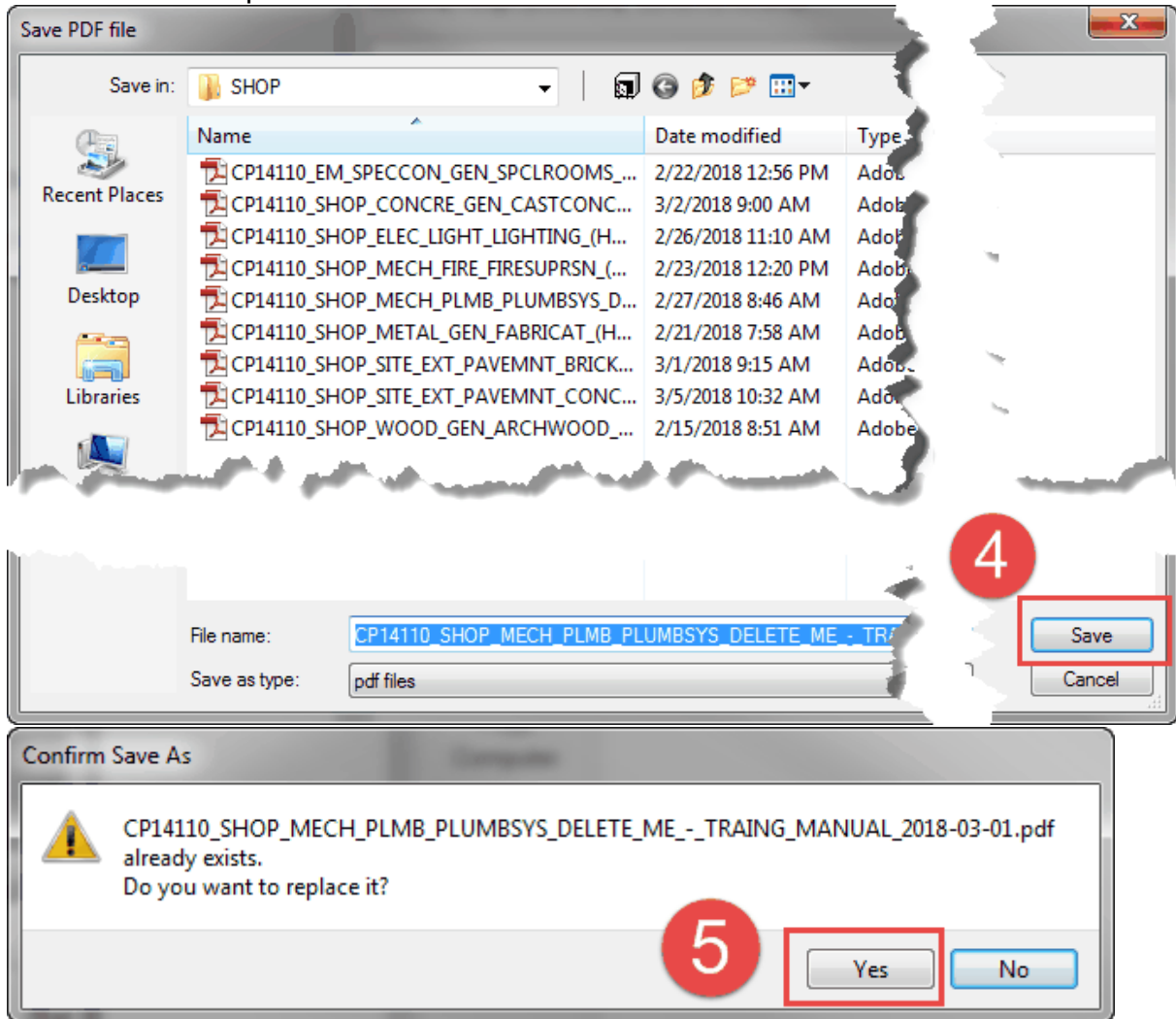
## 5.1 Modify Document

To modify the document by adding or removing pages:

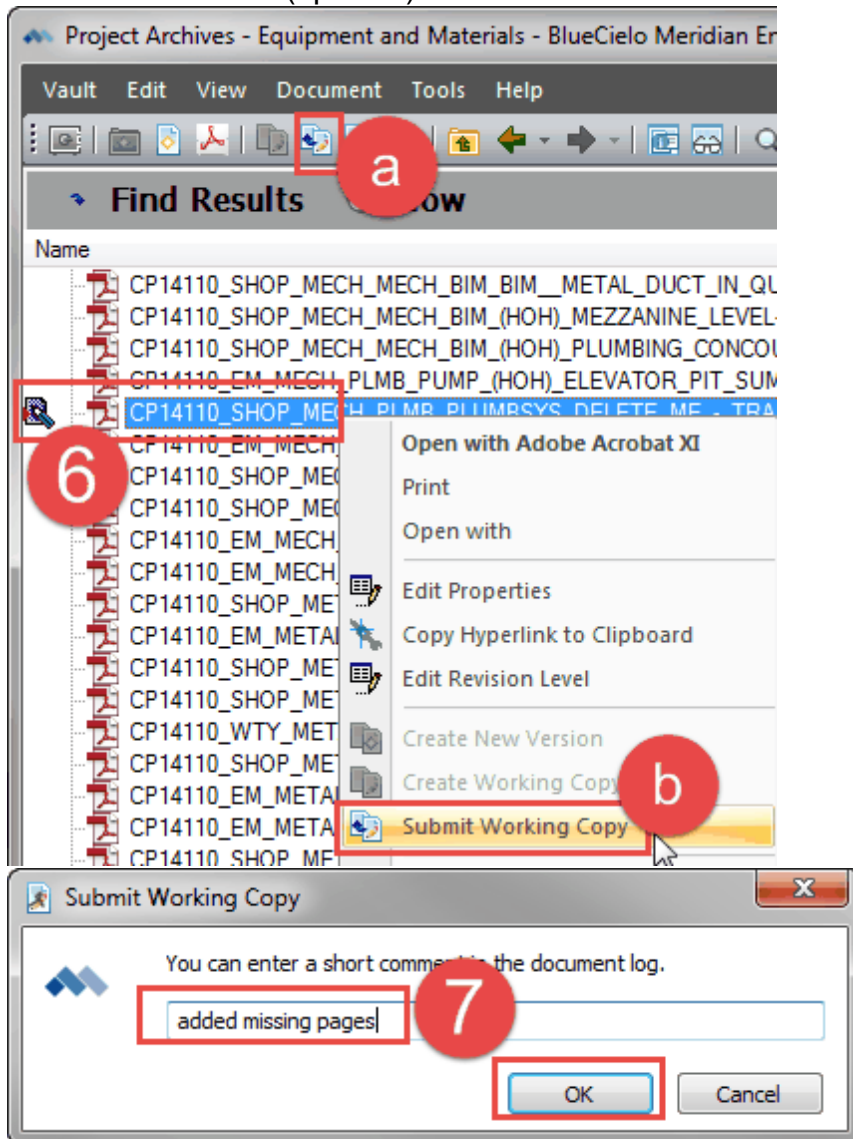
1. Double click to open the file in the native application (should be adobe acrobat, not foxit).
2. Make your edits.
3. Make sure to run the OCR and Preflight tools to make the file a searchable pdf/a file for archives. Anytime a file is modified in anyway, this process has to be done.
  - a. If you don't know how to do this, see the '**Searchable PDF/A Files**' training manual in Meridian.



4. Pre-flight - when prompted to save the file, don't change the location. Just click 'Save'. This will replace the file in Meridian.
5. Click 'Yes' to replace the file in Meridian.



6. Submit the working copy by either:
  - a. Select the file and click on the 'Submit Working Copy' icon.
  - b. Or, right click on the file and select 'Submit Working Copy'.
7. Enter a comment (optional) and click 'OK'.



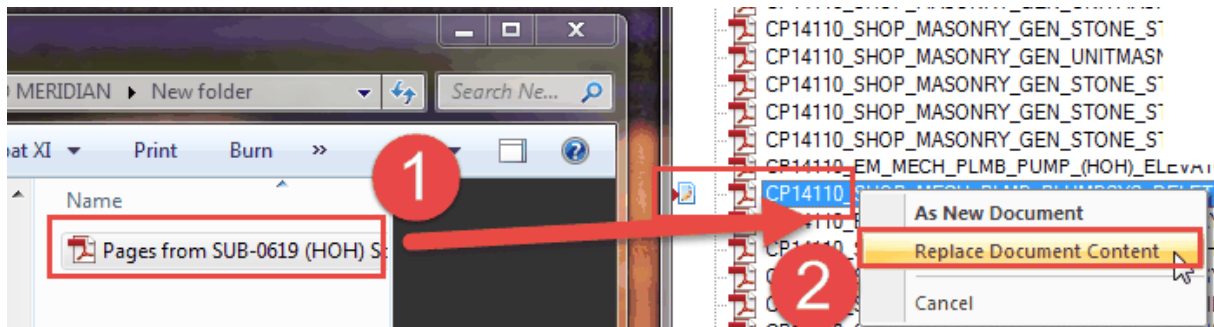


## 5.2 Replace Document

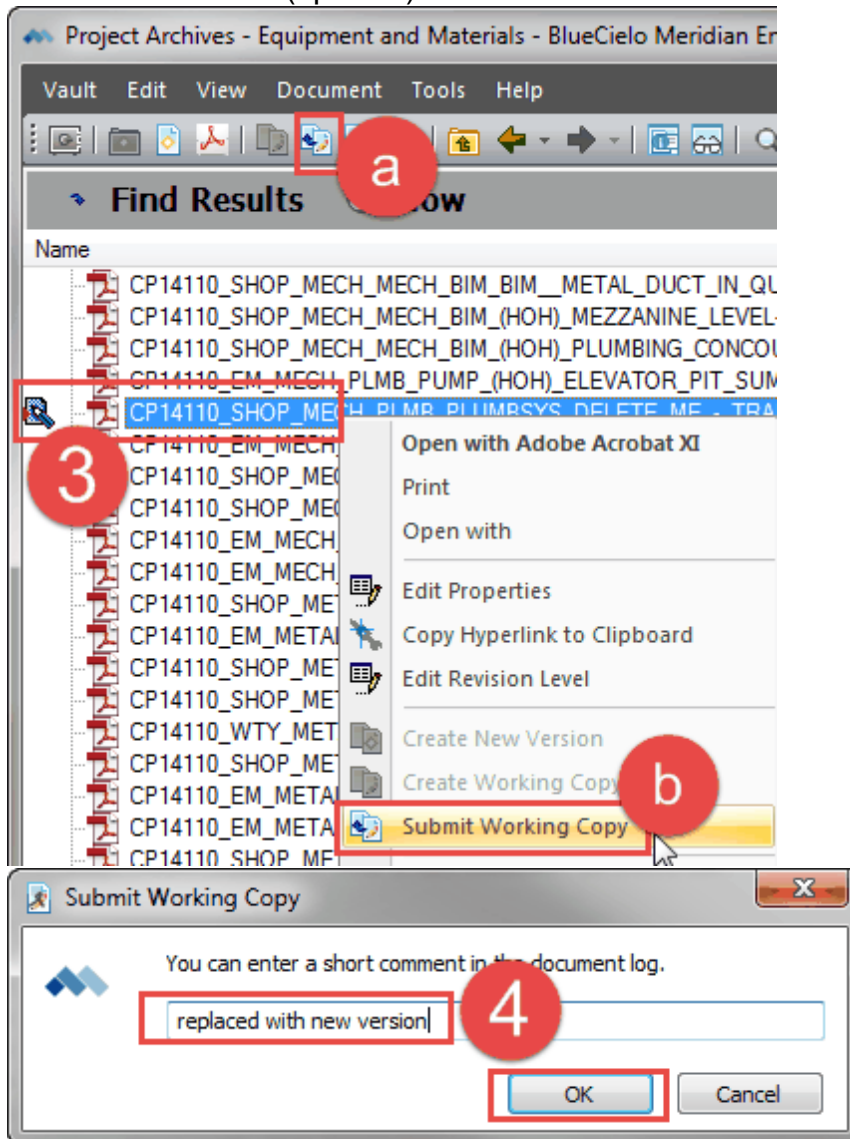
To modify the document by replacing the entire existing document with a new version:

- **Remember: Only add Searchable PDF/A files to the archive vaults.** Ensure the document is the correct format:
  - If you scanned it using Kodak, your scanner should be set up to automatically create these types of files (see the '**Kodak Capture Pro Software Set-up**' instructions in Meridian).
  - If the file was created electronically, you will have to run the 'OCR' and 'Preflight' tools in Adobe Acrobat (see the '**Searchable PDF/A Files**' training manual in Meridian).
  - Make sure you have **Adobe Acrobat** installed on your machine. Foxit will not work.

1. Drag the new file directly on top of the file in Meridian and let go of the mouse button.
2. Select 'Replace Document Content'.



3. Submit the working copy by either:
  - a. Select the file and click on the 'Submit Working Copy' icon.
  - b. Or, right click on the file and select 'Submit Working Copy'.
4. Enter a comment (optional) and click 'OK'.



## 6 Deleting Files

- Only Meridian System Administrators have access to delete the files in the archive vaults.
- If you need a file deleted, please use the 'Edit Properties' function and put '**DELETE ME**' or '**DELETE**' in the equipment description.
- We will check every week or so and delete any files with this description.
- You can also email [fissupport@ipf.msu.edu](mailto:fissupport@ipf.msu.edu) with the file name and we will go in and delete the file.

