



Purpose

The procedure for adding the hazardous materials documentation to Meridian Project Archives – Documents and General Warranties vault.

Participants

Project Services – Asbestos and Facilities Information Services

Policy

All files added to the archive vaults MUST be searchable PDF/a files, meaning they can be text searched and also are the government recognized long term archivable format (see creating searchable PDF/a file instructions).

Process Workflow



Process or Procedure

PIA - Environmental Compliance

1. Send completed project files to Environmental Compliance Student at time of payment

Environmental Compliance Student

2. Create searchable pdf/a file (see pdf/a creation procedure)
3. Ask Facilities Information Services to create project (if needed)

Facilities Information Services

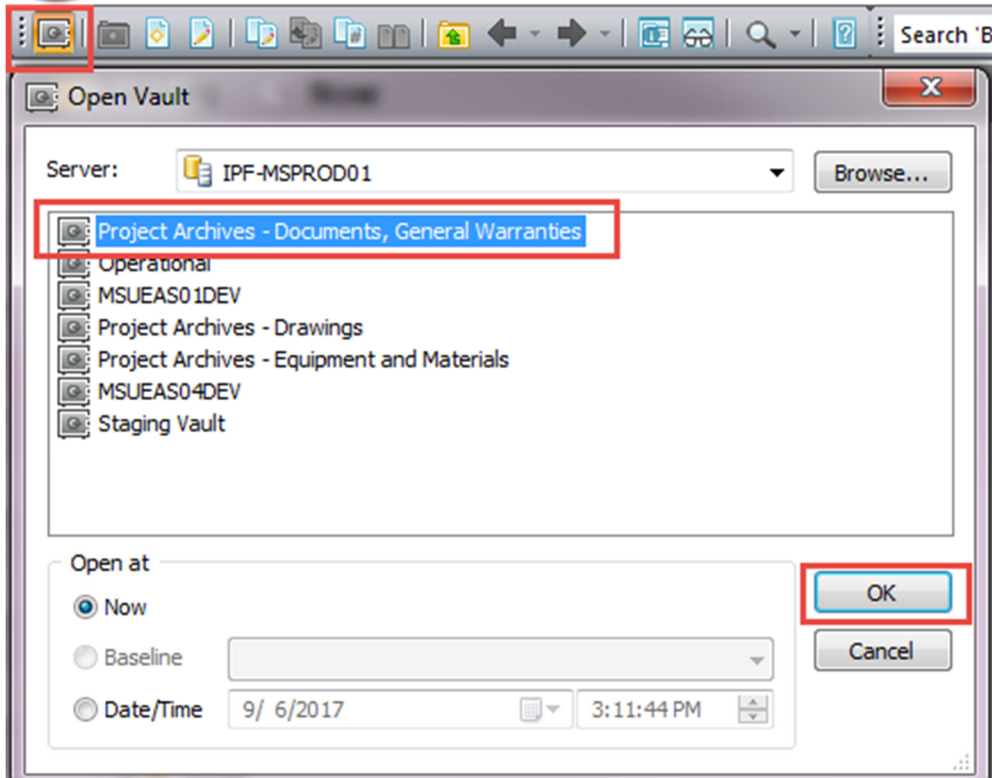
4. Create project in Records Project Database (if needed)

Environmental Compliance Student

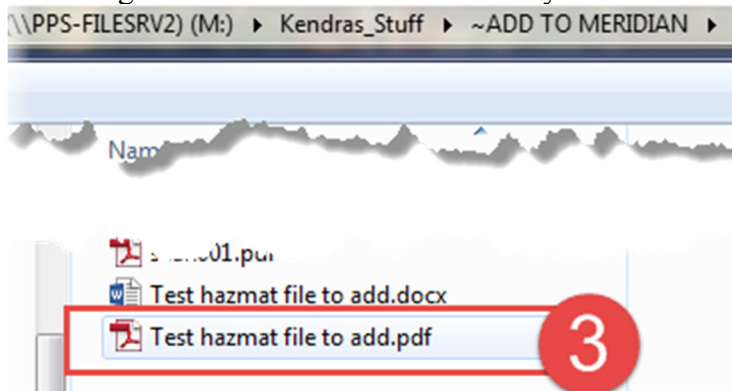
5. Add pdf/a file to Meridian project Archives – Documents and General Warranties vault
6. Send any hard copy files to Facilities Information Services for long term storage

Procedure

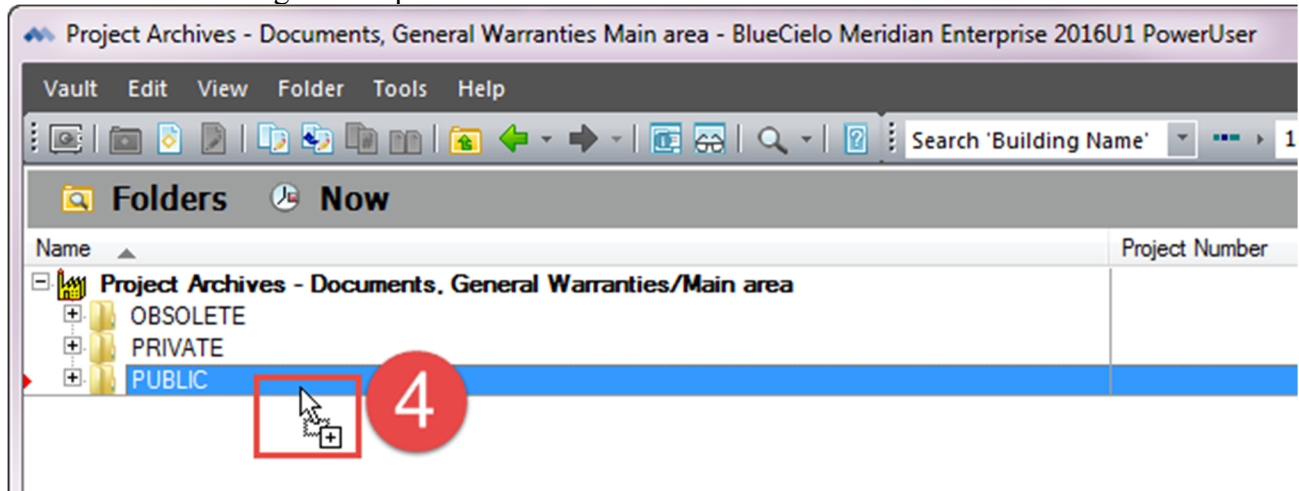
1. Open Meridian
2. Navigate to the Project Archives – Documents and General Warranties Vault



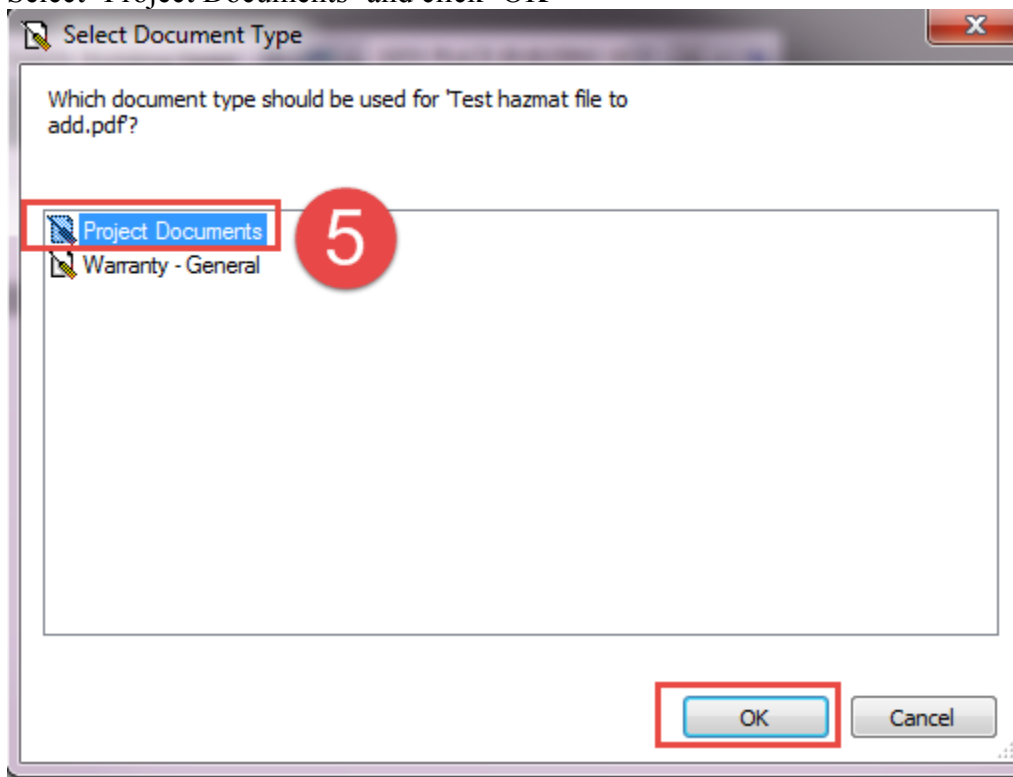
3. Navigate to the searchable PDF/a file you created



4. Select it and 'drag and drop' it into Meridian.



5. Select 'Project Documents' and click 'OK'

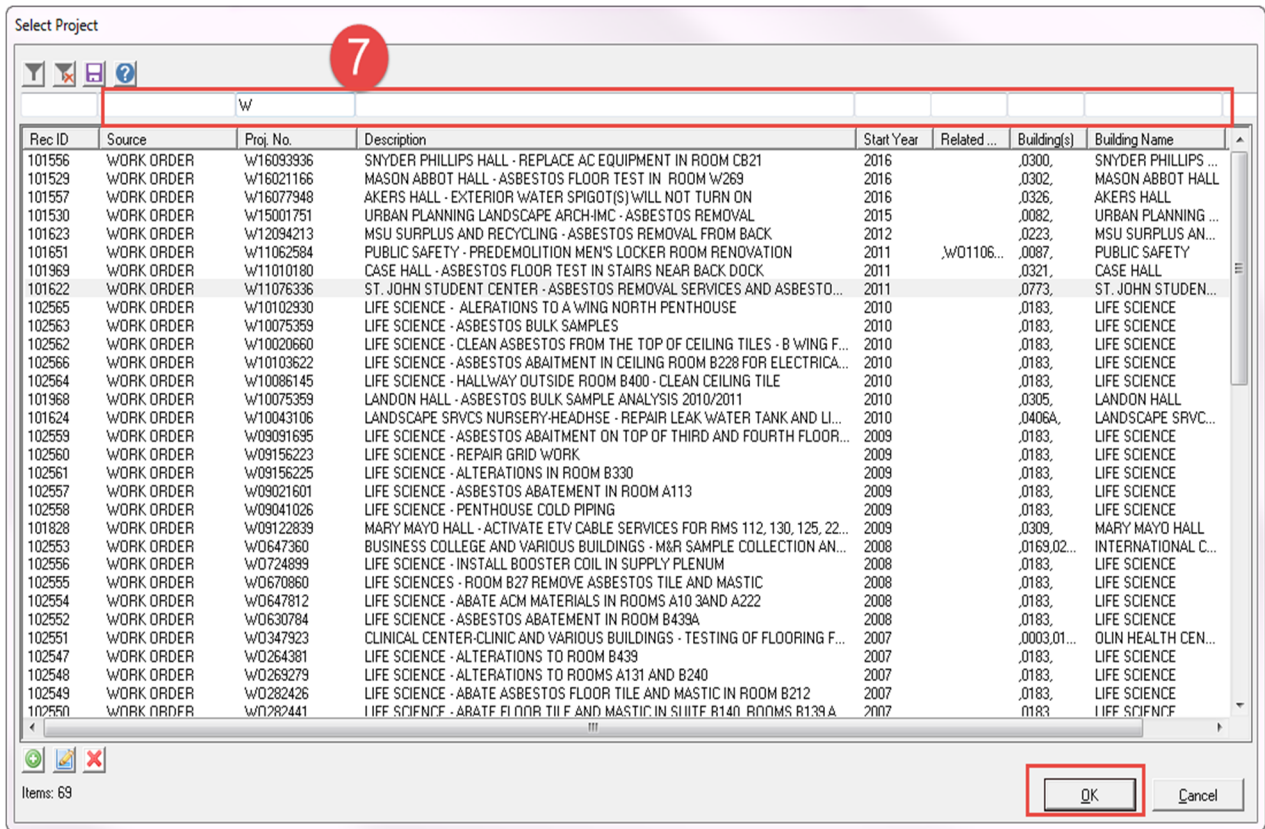


Filling out the Wizard:

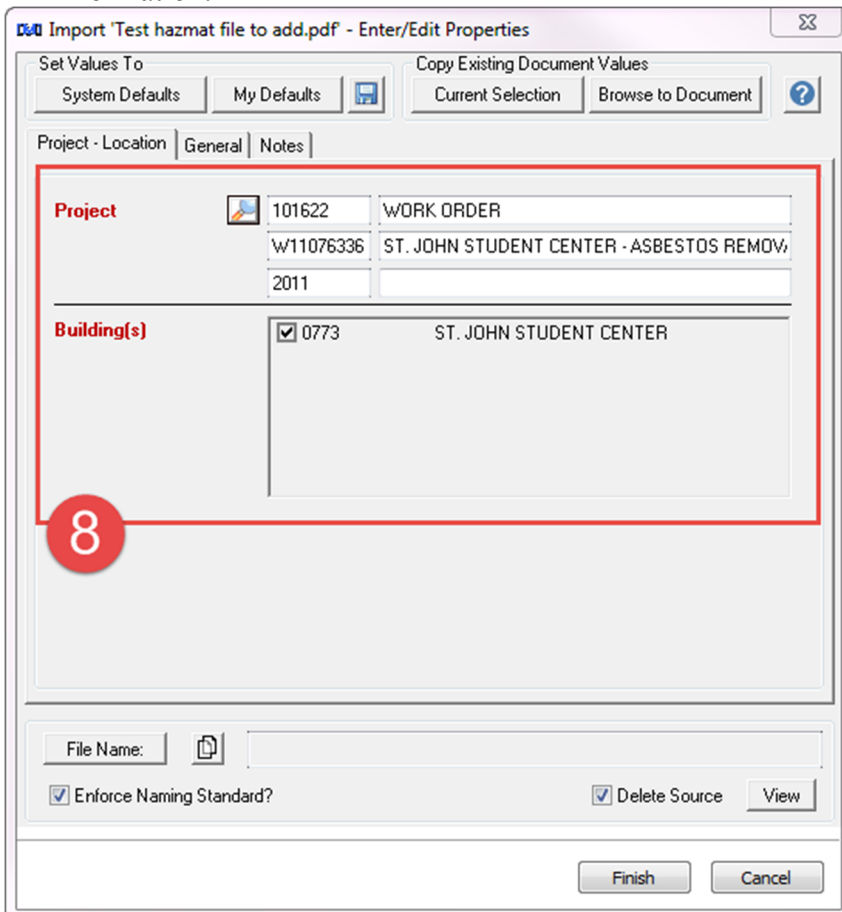
6. On the 'Project – Location' tab, click on the magnifying glass next to 'Project'

The screenshot shows a dialog box titled "Import 'Test hazmat file to add.pdf' - Enter/Edit Properties". At the top, there are two sections: "Set Values To" with buttons for "System Defaults", "My Defaults", and a save icon; and "Copy Existing Document Values" with buttons for "Current Selection", "Browse to Document", and a help icon. Below this is a tabbed interface with "Project - Location" selected, and "General" and "Notes" tabs. The "Project" section has a red circle with the number "6" and a magnifying glass icon next to the "Project" label. There are three empty input fields for project details. Below that is a "Building(s)" section with a large empty text area. At the bottom, there is a "File Name:" field with a document icon, and two checked checkboxes: "Enforce Naming Standard?" and "Delete Source". There is also a "View" button. At the very bottom are "Finish" and "Cancel" buttons.

7. Select the project from the project administration tool using the filtering tools. Either double click on the project name, or select it, then click OK.
- Remember to use the most parent project. If the WO is rolled up to a PR or CP, use those. If the project does not exist, please send a request to fisrequests@ipf.msu.edu or call 3-3434 to request the project creation.**



8. Once the project is selected, it should auto-populate the wizard with the project and building information.



9. Open the 'General Tab' of the wizard
 - a. Fill in the subclass and subclass detail by typing or using the magnifying glass icon to select the value from a drop down list.
 - b. Fill in the description with the RELEASE NUMBER
 - c. Fill in the document date (you can use the date on the most recent or oldest document for the whole packet)
 - d. Fill in the Source Company

Import 'Test hazmat file to add.pdf - Enter/Edit Properties

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

Project - Location: **General** **9**

a

Doc Class	DOC	DOCUMENT
Sub Class	HAZMAT	HAZARDOUS BUILDING MATERIALS
Sub Class Detail	ASBESTOS	ASBESTOS

b

Security Level: PB | PUBLIC

Description: ih 1234

File Suffix: IH 1234

c

Document Date: 9 / 9 / 2017

Univ. Archive No.:

d

Source Company: FIBER | FIBERTEC

Volume:

Document Number:

Revision Level:

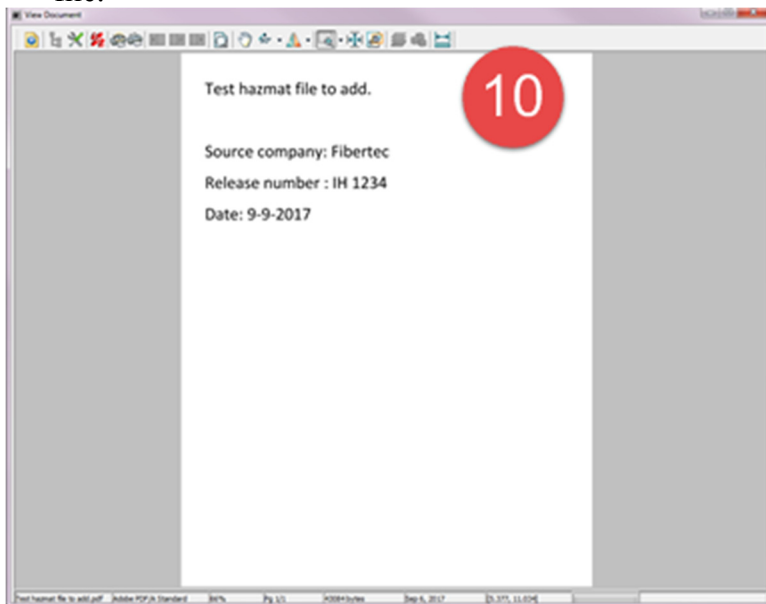
10

File Name:

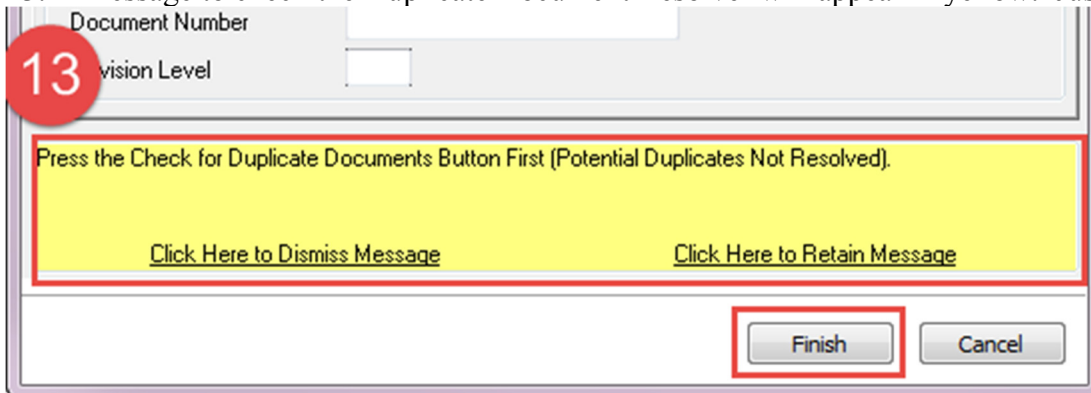
Enforce Naming Standard? **11** Delete Source

12

10. If you need assistance remember what was on the file, use the ‘View Button’ on the wizard to see the file.



- 11. The ‘Delete Source’ check box should be checked to ensure Meridian becomes the central repository for the files.
- 12. Click ‘Finish’ when you are done filling out the wizard.
- 13. A message to check the Duplicate Document Resolver will appear in yellow. Just click Finish again.



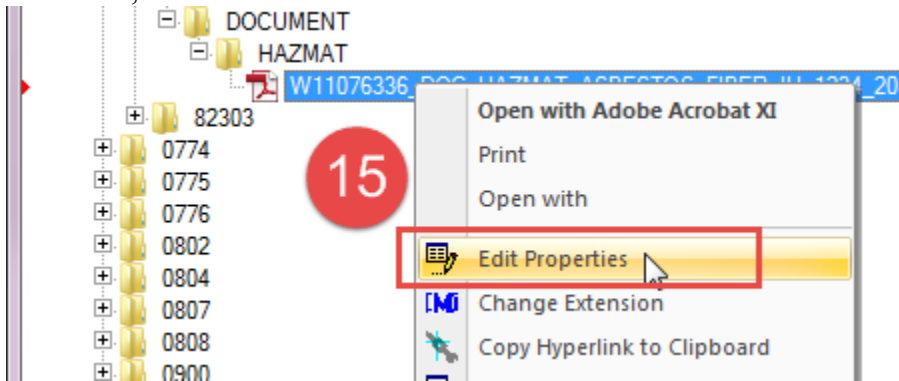
14. The file is now in Meridian.

A screenshot of a file explorer window showing a folder structure. The folder 'DOCUMENT' contains a sub-folder 'HAZMAT'. Inside 'HAZMAT', a file named 'W11076336_DOC_HAZMAT_ASBESTOS_FIBER_IH_1234_2017-09-09.pdf' is highlighted. A red circle with the number '14' is overlaid on the file name. Below the file explorer is a table with columns for file details.

W11076336	HAZARDOUS...	ASBESTOS	IH 1234	FIBERTEC
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To Edit the Properties:

15. If you need to edit the properties of a file, right click on the file, then select edit properties. Fix any issues, then click Finish.

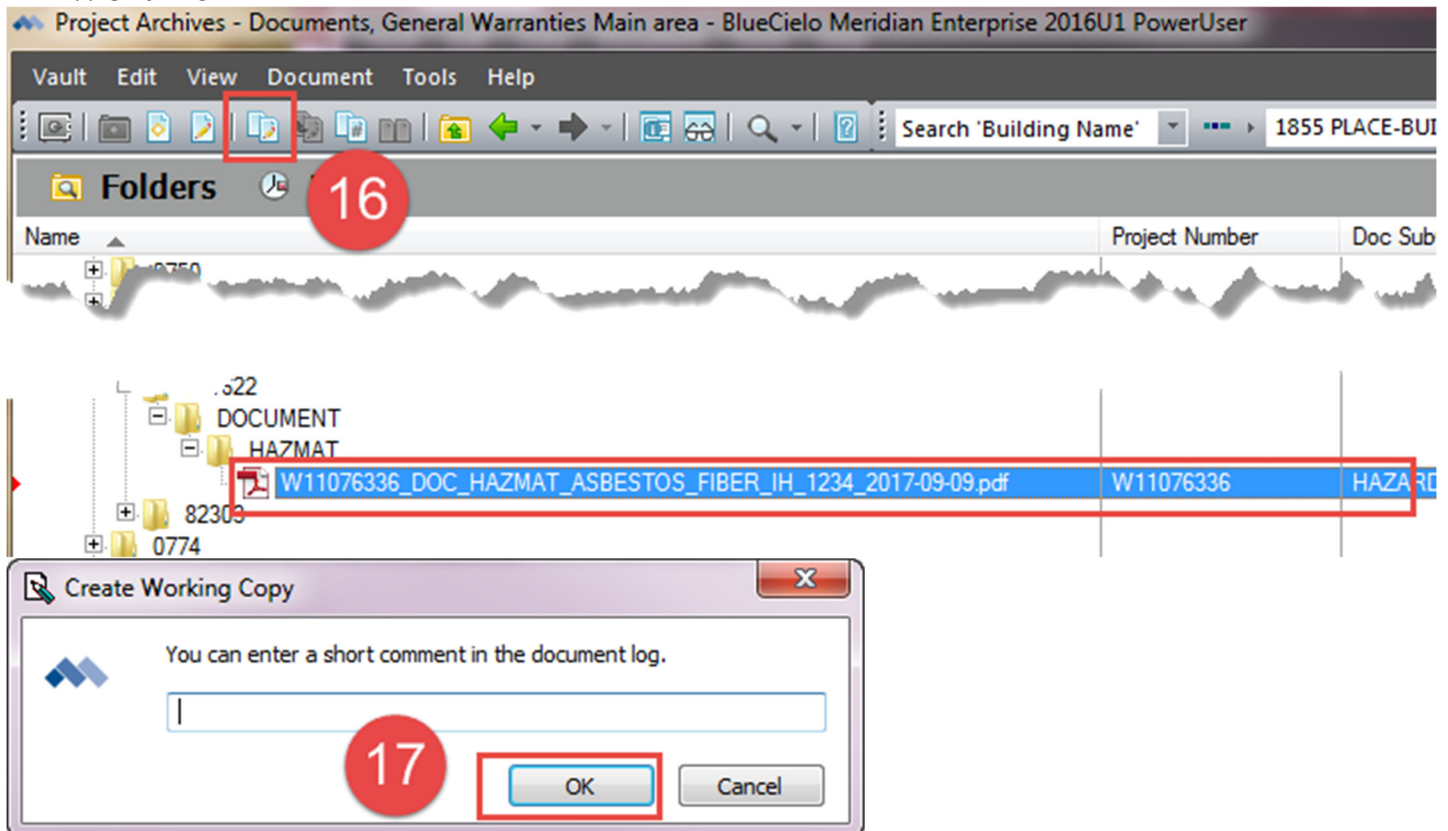


*if you need a file deleted, put 'Delete Me' in the description field.

To Modify a files contents:

16. To change the contents of a file, select it in Meridian and click the 'Create Working Copy' button or right-click and select 'create working copy'

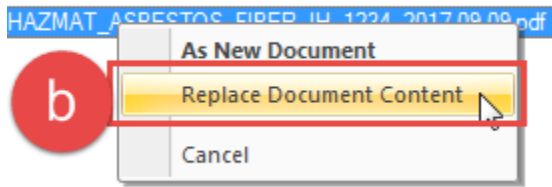
17. Click 'OK'



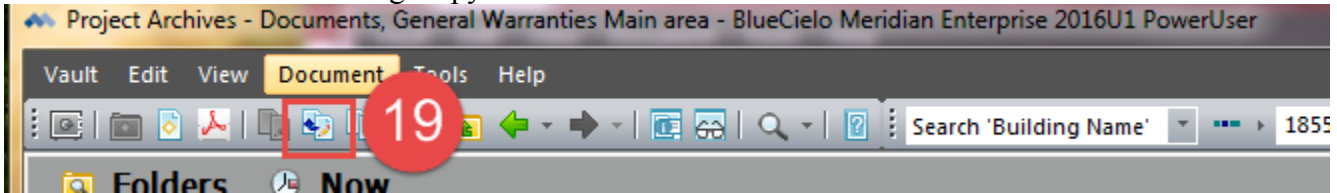
18. Changes to file:

- a. Either double click and open the file to work on it (remember to OCR and PDF/a again anytime you make changes to the file).

- b. Or, drag the new version of your pdf/a directly over top of the one in Meridian.



19. Once your changes are done, select the file, click the 'Submit Working Copy' button or right-click and select 'Submit Working Copy'.



Revision History and Owner of Document

Created: September 6, 2017

Updated: N/A

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