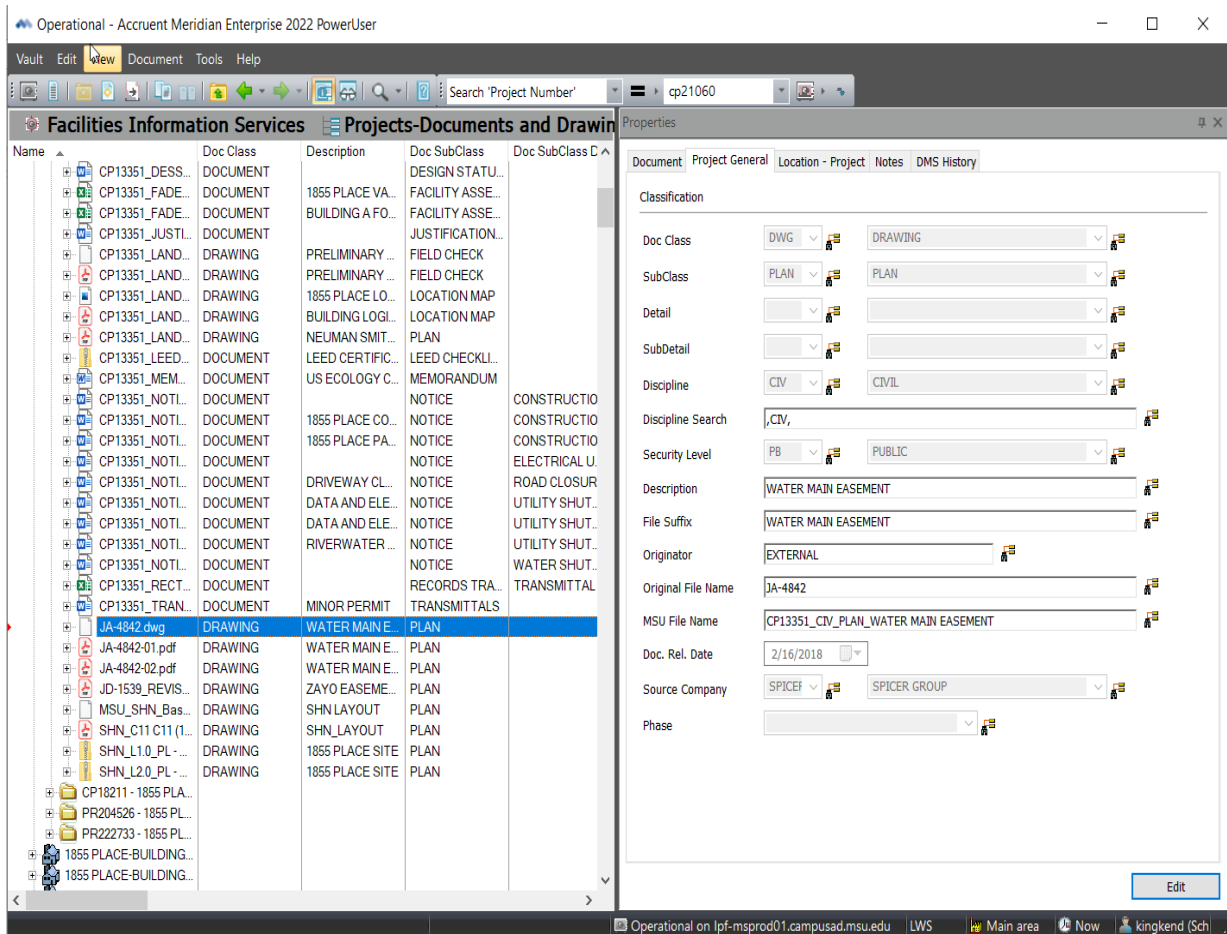


Meridian 2022 Projects (Documents)

This manual will provide instructions for searching, viewing, adding, editing and modifying files in the Operational Projects area.



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September 25, 2023

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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 are located
3. Why we are using 'Projects'
4. How to use 'Projects'
 - a. Searching for documents
 - b. Adding documents
 - c. Using other document types from Meridian
 - d. Modifying documents
 - e. Editing Properties
 - f. Deleting documents



2 Projects Explanation

Projects is an area in the Meridian Operational Vault where the native files for current and past projects are stored. **Projects - Documents**, **Projects - Drawings** and **Project Drawing Sets** are Document Types within Projects.

Meridian can be used as a central repository for the documents and drawings while they are being worked on during a project. Native file formats can be stored in the Operational Projects areas and either kept current as the project progresses or be used as reference documents for future projects. Files in the projects area are NOT archived. The approved, final versions are taken from the hard copies and project management systems used by IPF.

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. 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.

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.

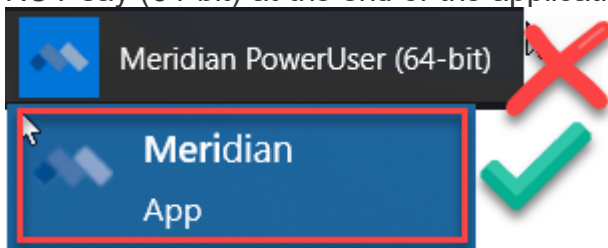
3 General

3.1 Software Version

Meridian 32 bit vs. 64 bit client

The install of Meridian 2022 might appear on your computer in two versions. Do NOT select the 64 bit client, as your Meridian will not work correctly.

When selecting Meridian from the start menu or your desktop icons, make sure it does NOT say (64-bit) at the end of the application name.



After opening Meridian, make sure you are NOT in the 64 bit client by looking at the top of your Meridian window (if you are, see above).

Operational Main area - Accruent Meridian Enterprise 2022 PowerUser x64

Operational Main area - Accruent Meridian Enterprise 2022 PowerUser

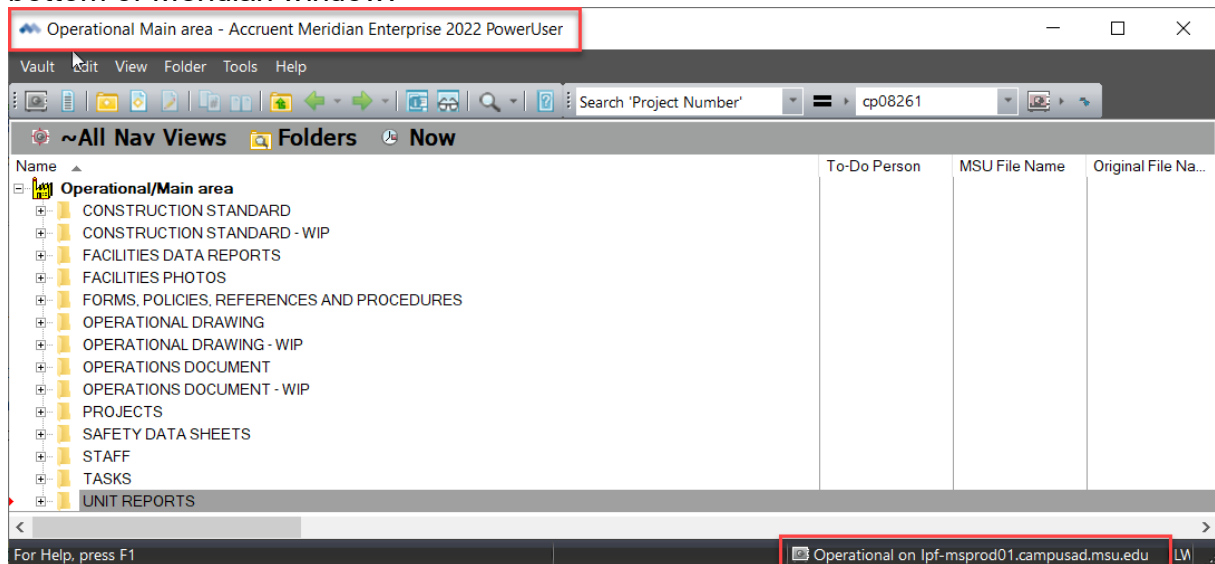
3.2 Location, Location, Location

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

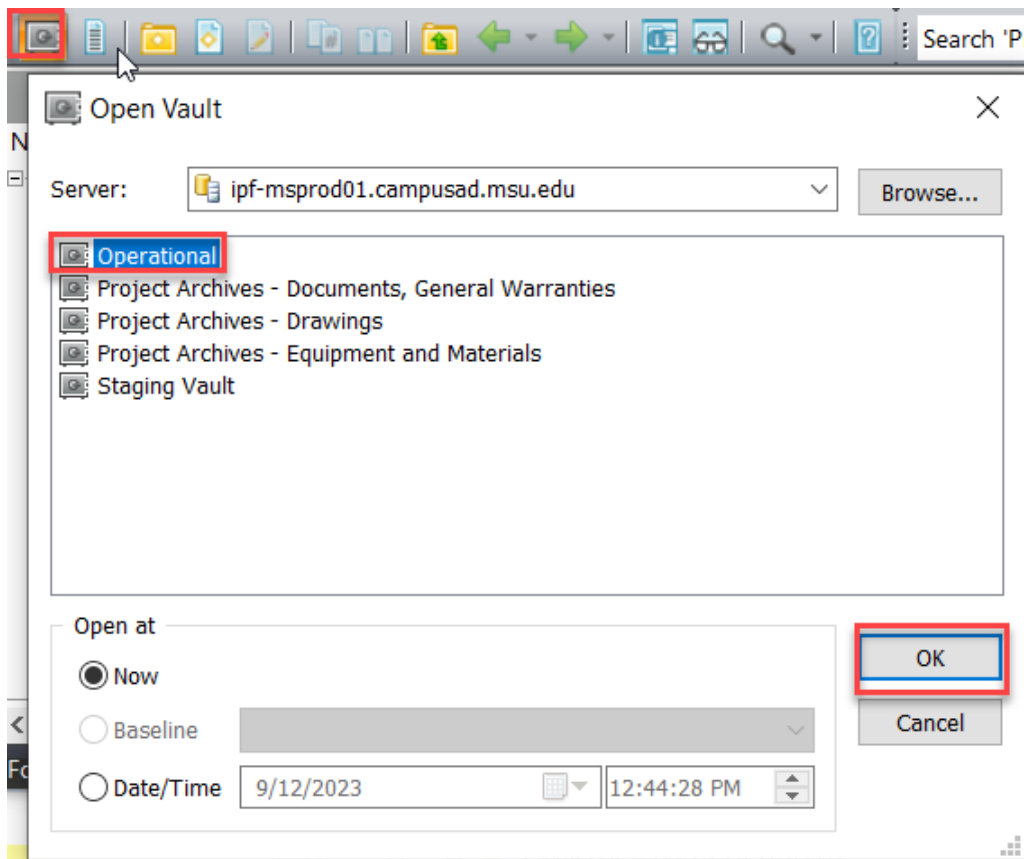
The different vaults and document types are set up for specific reasons and your permissions vary depending on where you are and what you are trying to do. To access Projects, you have to be in the **Operational** Vault in Meridian.

3.2.1 Operational Vault

Make sure you are in the 'Operational Vault'. The vault name is displayed at top and bottom of Meridian window.



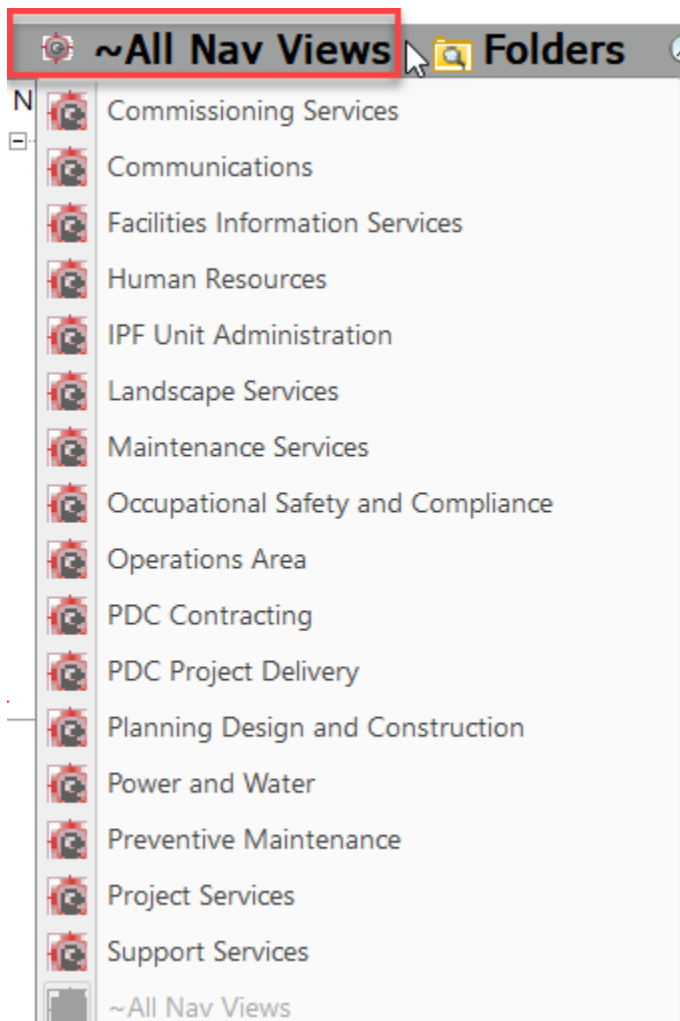
If you are not working in the 'Operational Vault', use the vault icon to select it. Select 'Operational' and double-click or Click 'OK'



3.2.2 Scopes

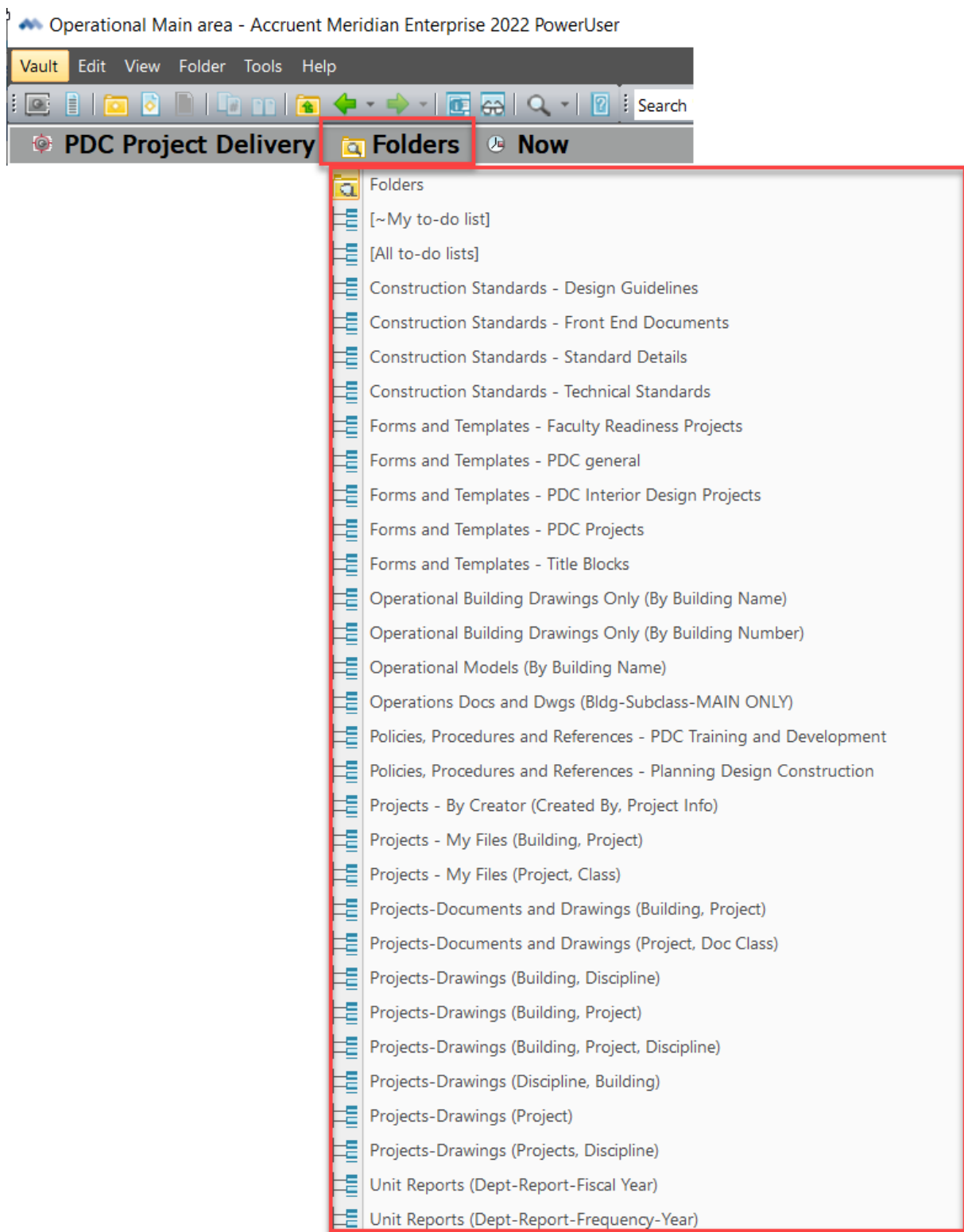
The Scope will narrow the focus to the specific areas you need to view or work in within Meridian. Scopes are only used in the Operational Vault at this time.

******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.******



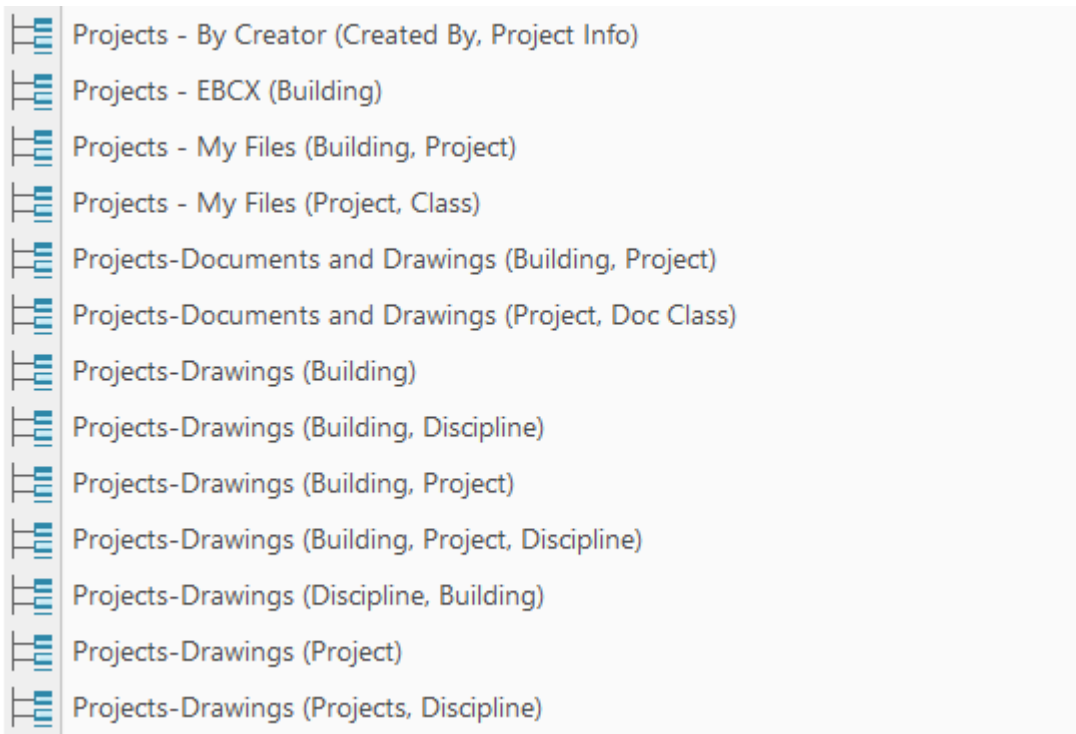
3.2.3 Nav Views

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 scope you selected will determine the Nav Views you see in your drop down list.



The Anatomy of a Nav View:

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



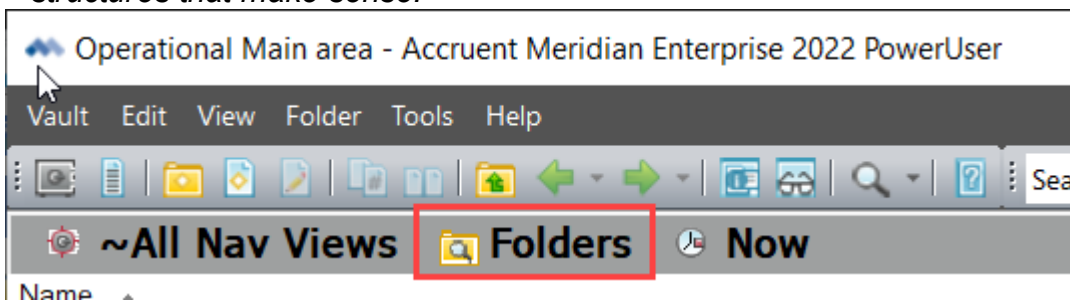
3.2.4 Folders View

The Folders 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.**

- There is **NO NEED** to search for the project first or create a folder, you can simply drag and drop a file in the Folders view. Meridian will file it in the correct location based on how you describe the file.

Remember:

- *Folders 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.*



- Folders 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.
- If you see Folders - Navigate away

4 Project Documents

Overview:

- Project Documents in the Meridian Operational Vault will house the documents being worked on, mostly in their native formats (.doc, .xls, .ppt).
- Meridian Projects is **NOT** the final resting place for these Documents. The final versions will either be hard copies, attached to a Unifier Business Process, placed in the Unifier Document Manager, in Plangrid, Autodesk Build or added to Meridian Project Archives directly. If the files were placed in the Meridian Projects area, they will be left there and not archived.

Permissions:

- Currently all Planning, Design and Construction, Project Services and Commissioning staff members have the permissions to add documents, 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. If a file is deleted, it is not actually removed from the database and can be retrieved if needed.

4.1 Adding Documents

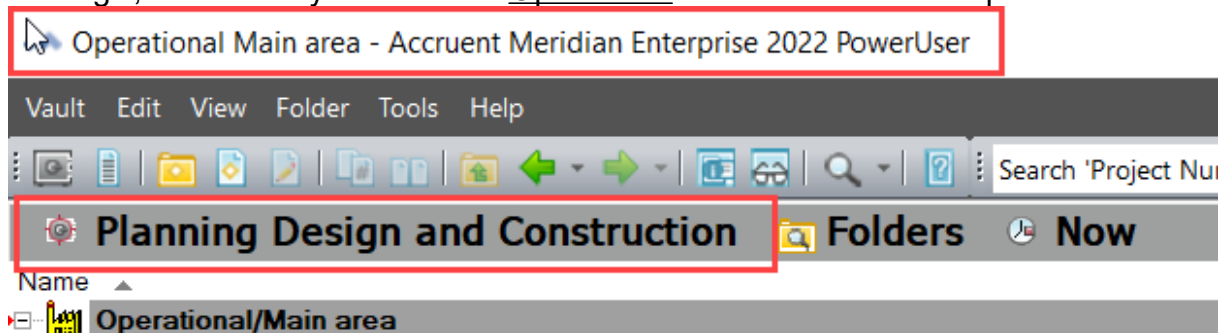
There are a few different choices for adding documents to Projects.

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

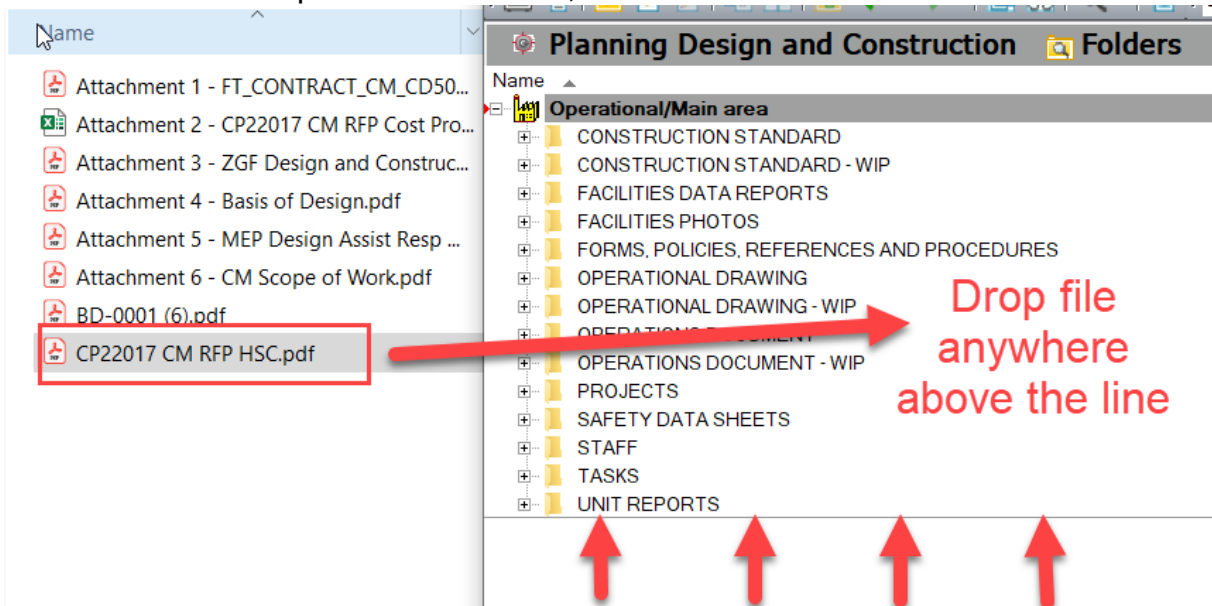
To add a document that was created outside of Meridian into the system, select the file and drag and drop it into Meridian.

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

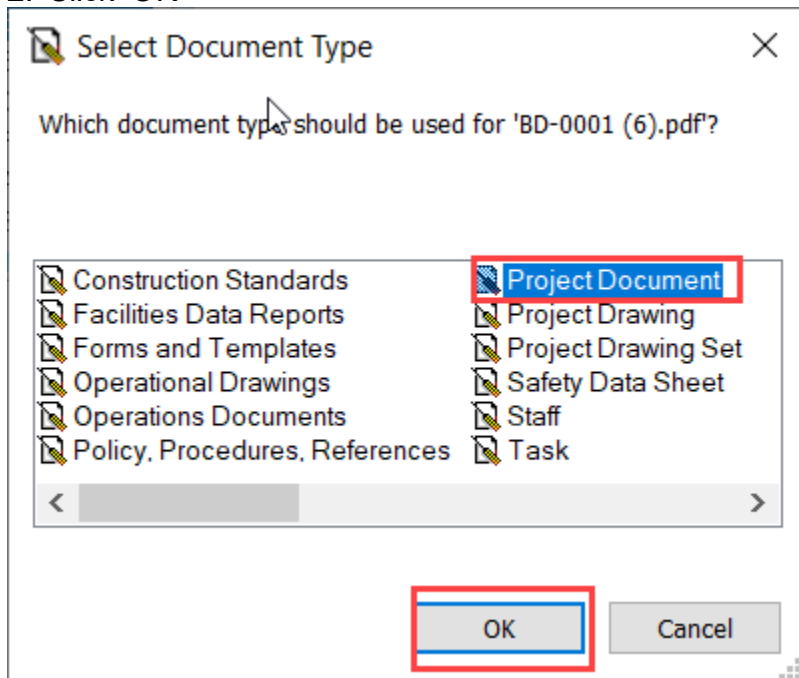


Find the document you are going to add and drag it into Meridian. You do NOT need to conduct a search first.

- 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.

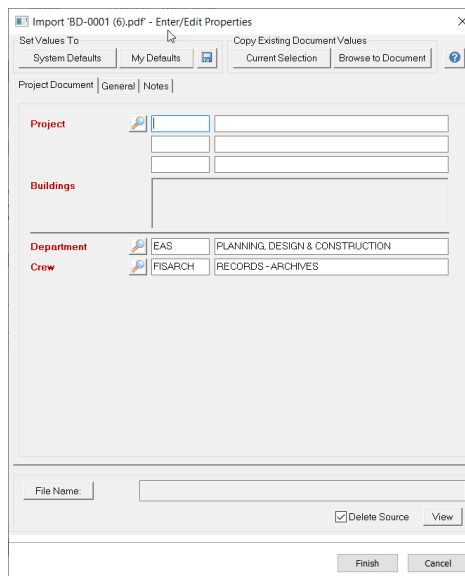


1. Select the Document Type, in this case 'Project Document'
2. Click 'OK'



Different scopes, permission levels and native file types will give you a different set of options for document type selection.

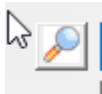
4.1.1.1 Describe the Document



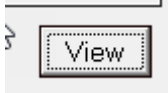
The **Wizard** is the dialog box that comes up when you are adding a document or editing document properties.

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 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

Filling out the Project Document tab of the wizard.

Import 'CP22017 CM RFP HSC.pdf' - Enter/Edit Properties

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

Project Document | General | Notes

Project [Magnifying Glass] [] [] [] []

Buildings []

Department [Magnifying Glass] EAS | PLANNING, DESIGN & CONSTRUCTION

Crew [Magnifying Glass] FISARCH | RECORDS - ARCHIVES

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

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

Project Document | General | Notes

Project [Magnifying Glass] [] [] [] []

Buildings []

DO NOT TRY TO TYPE IN THESE FIELDS

Project Selection:

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

- **Rec Id** - The Record ID used by Records as a unique project identifier
- **Source** - Legacy, Capital Project, Project Request, Work Order

- **Proj. No.** - Project Number- Capital Project (CP#####), card numbers (#####), Project Request (PR#####), Work Orders (WO##### or (W#####), 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 or related, we relate them in the project database
- **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. This is NOT the FAMIS status.
 - Active - files can be added to this project
 - Inactive - combined with another project that is active. Files cannot be added to this project.

Project Selection Tool

Select Project

Rec ID	Source	Proj. No.	Description	Start Year	Related P...	Building(s)	Building Name	Status
This list is not populated because without filtering it takes a long time to load. Enter at least one filter above or expect slow response from the Apply Filters button.								

OK Cancel

2. Conduct a search for the project
3. Select the project
4. click 'OK' (or double click on selection)

Select Project

Rec ID	Source	Proj. No.	Description	Start Year	Related P...	Building(s)	Building Name	Status
1	LEGACY	REC000001	TEST-TEST-TEST-TEST-TEST-TEST-TEST...	2008		.0001.0167...	PAOLUCCI	ACTIVE

Items: 1

OK Cancel

5. Now the project information is filled in on the wizard.
6. The department and crew you work for should also have auto-populated.

Import 'CP22017 CM RFP HSC.pdf' - 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 - TEST - TEST - 1

2008 |

Buildings

0001 | PAOLUCCI

0167 | IPF

0002 | BERKEY HALL

Department EAS | PLANNING, DESIGN & CONSTRUCTION

Crew FISARCH | RECORDS - ARCHIVES

4.1.1.1.2 General Tab

Filling out the General tab of the wizard.

Import 'Projects - Docs only - 2016 REFERENCE.pdf' - Enter/Edit Properties

Set Values To: System Defaults | My Defaults |

Copy Existing Document Values: Current Selection | Browse to Document |

Project Document | **General** | Notes

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

1. Select a Sub Class.
 - The Sub Class describes what the document is.
 - Different documents may have one or more levels of description required for Sub Class field.

Import 'Projects - Docs only - 2016 REFERENCE.pdf' - Enter/Edit Properties

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

Project Document | General | Notes

Sub Class	STUDY	STUDY
Sub Class	PROFSRV	PROFESSIONAL SERVICES SELECTION
Sub Class Detail	AE	ARCHITECT/ENGINEER
Sub Detail	RECMEMO	RECOMMENDATION MEMO
Sub Class	SPEC	SPECIFICATIONS
CSI SubDivision	042000	UNIT MASONRY
Security Level	PB	PUBLIC

2. Description adds to the file name (file suffix) and helps describe your document further.

Project Document | General | Notes

Sub Class	NOTICE	NOTICE
Sub Class Detail	TILSHUTDN	UTILITY SHUTDOWN
Description	water	
File Suffix	WATER	

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

Originator: INTERNAL

Source Company: [Empty]

Orig. FileName: Projects - Docs only - 2016 REFERENCE

MSU File Name: REC000001_NOTICE_UTILSHUTDN_WATER

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

Originator: EXTERNAL

Source Company: STOFMICH STATE OF MICHIGAN

Orig. FileName: Projects - Docs only - 2016 REFERENCE

MSU File Name: REC000001_NOTICE_UTILSHUTDN_WATER

4.1.1.1.3 Finishing Up

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

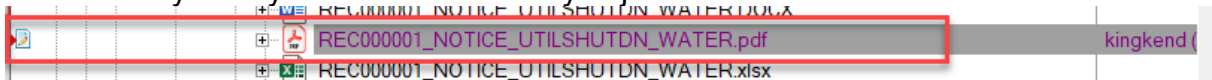
1. Check the 'delete source' box to ensure Meridian is the official and only place the document resides.
2. Click 'Finish' to add the file to Meridian.

File Name: REC000001_NOTICE_UTILSHUTDN_WATER

Delete Source View

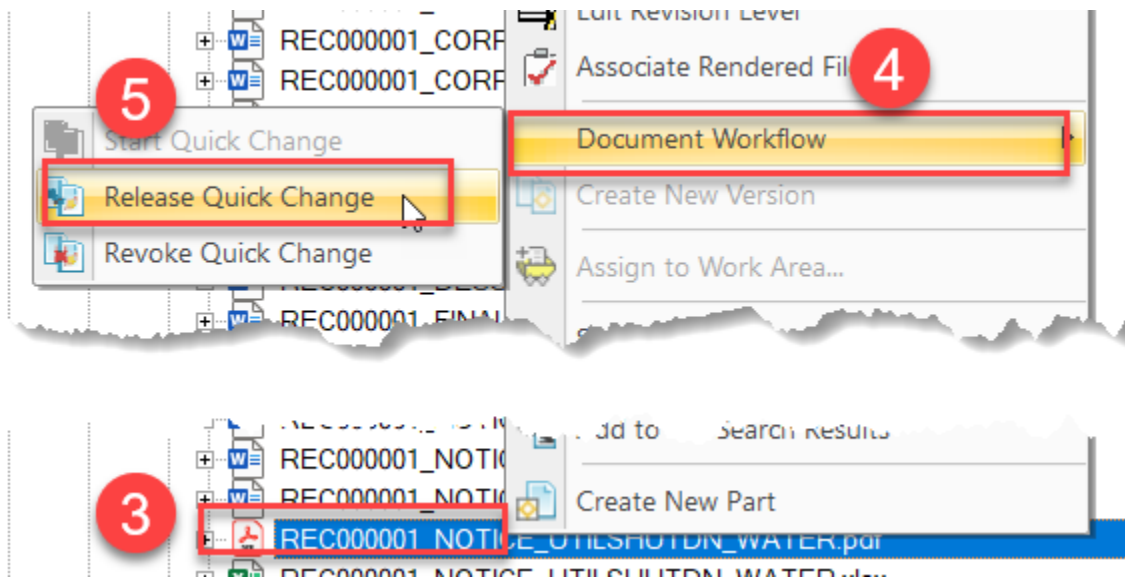
Finish Cancel

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

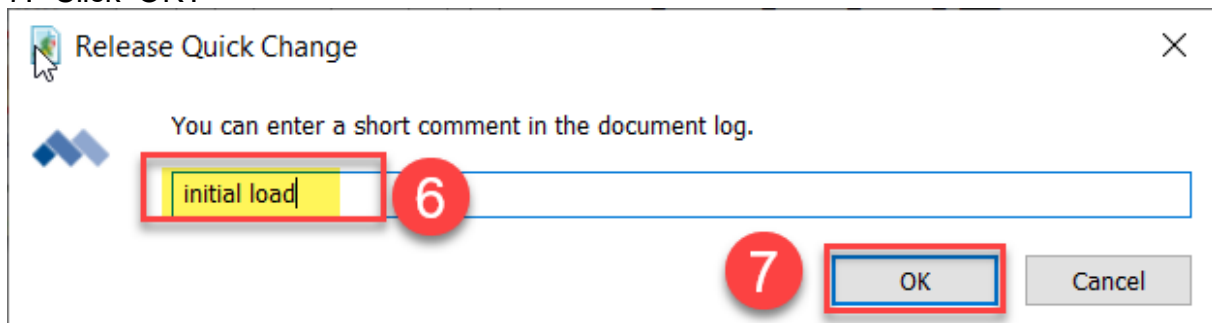


Now you will need to Release the document for Meridian to store the first version of it.

3. Right-click on the file
4. Select 'Document Workflow'
5. Select 'Release Quick Change'

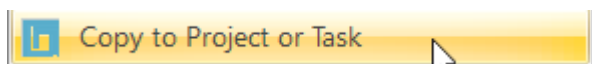


6. Enter a comment (optional)
7. Click 'OK'.

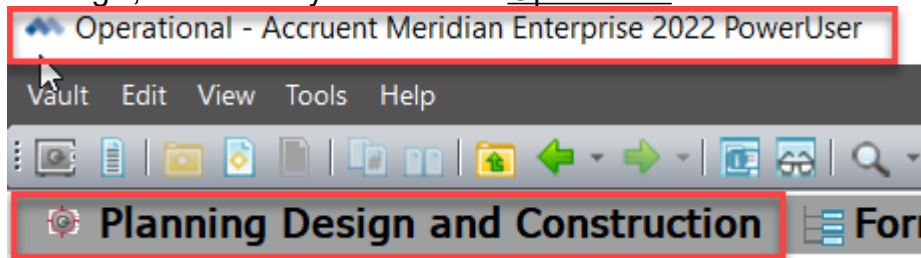


4.1.2 Copy to Project or Task

Using the 'Copy to Project or Task' feature in Meridian to add files ensures you are using the most current version of the form or standard for your project. 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.



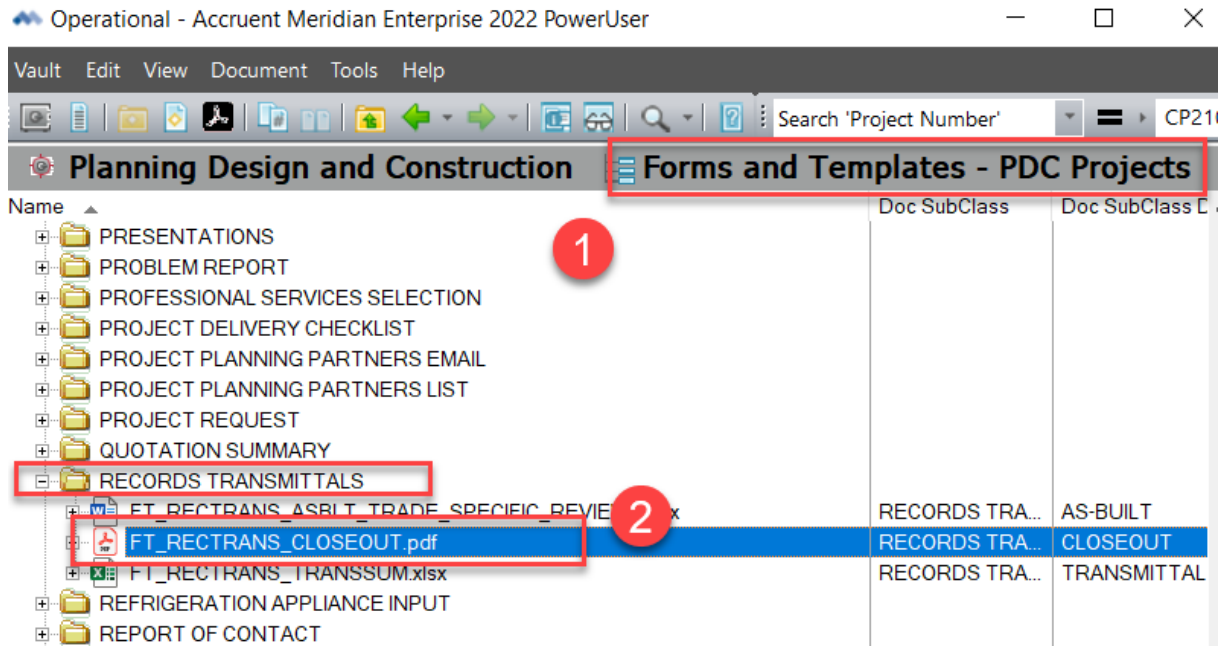
To Begin, make sure you are in the Operational Vault and correct Scope.



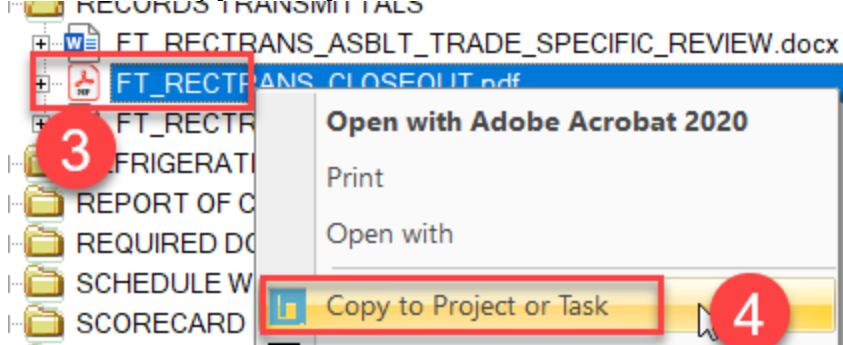
4.1.2.1 Forms and Templates

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 using the Nav Views
2. Select the Forms and Templates Nav view that will display what you are looking for.

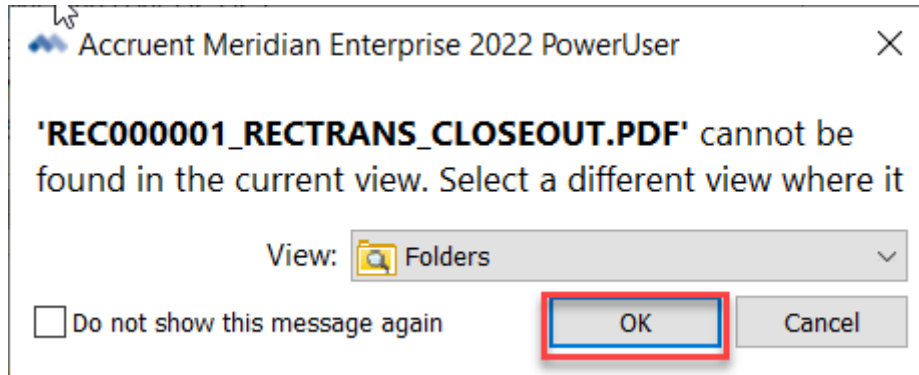


3. Right-click on the form
4. Select 'Copy to Project or Task'

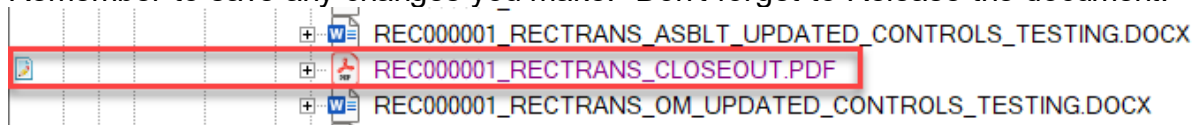


5. Verify 'ActiveProjectDocuments' is displayed
6. Click 'OK'.

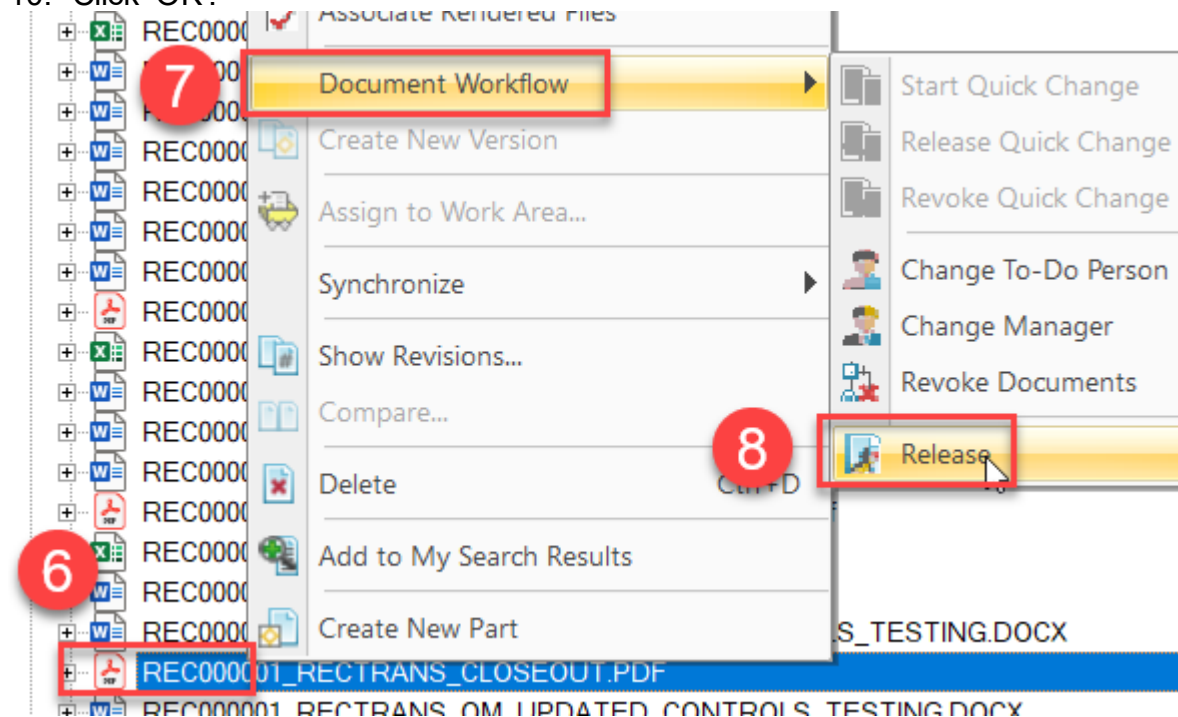
Once you have clicked 'Finish', because you are in a different Nav View where project documents do not exist, Meridian will ask to switch to the 'Folders' view (or you can select a different Nav View) in order to view the document you just added to Projects. Click 'OK'.

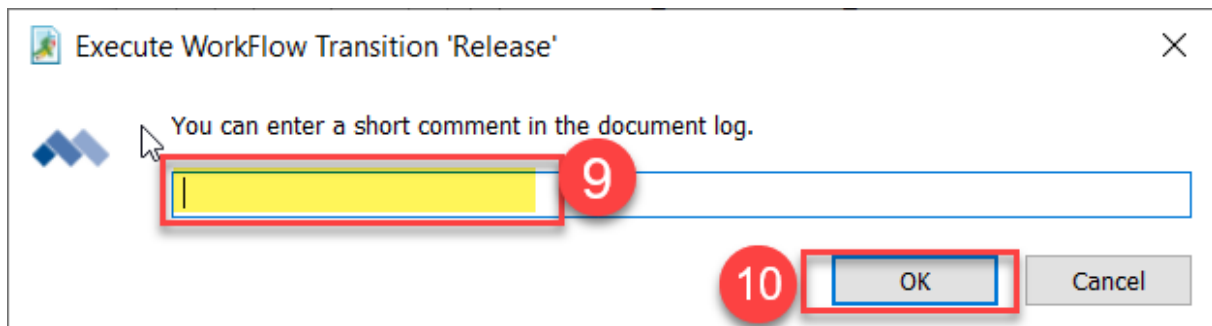


Work on the document... remember this is a blank form. It will need to be filled in to become project specific. Double click to open the file in the native application. Remember to save any changes you make. Don't forget to Release the document.



6. Right-Click on the file
7. Select 'Document Workflow'
8. Select 'Release'
9. Enter a comment (optional)
10. Click 'OK'.





4.2 Modifying Documents

Modifying documents is used to update the content of 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 document content.

You will:

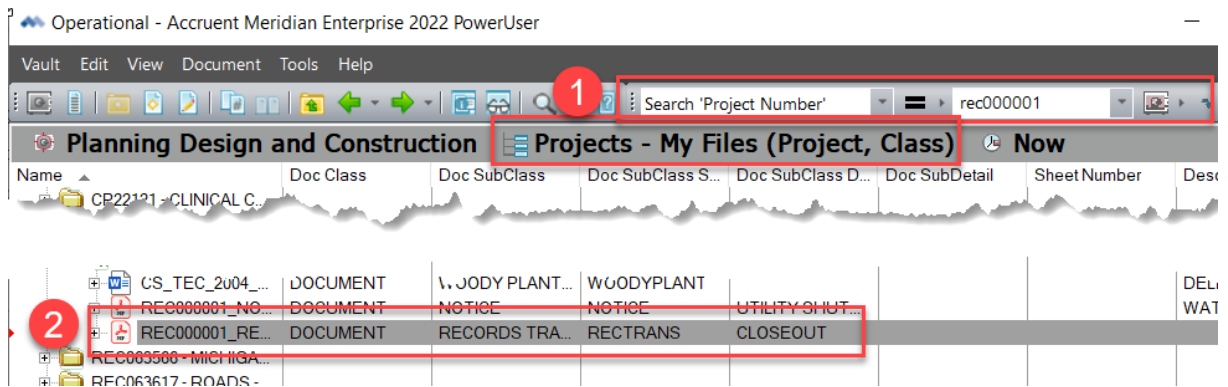
1. Start a Quick Change
2. Modify the Document
3. Release the Quick Change

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

4.2.1 Start Quick Change

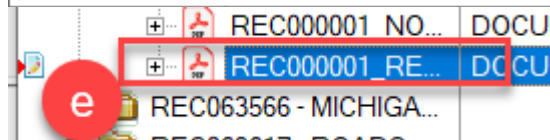
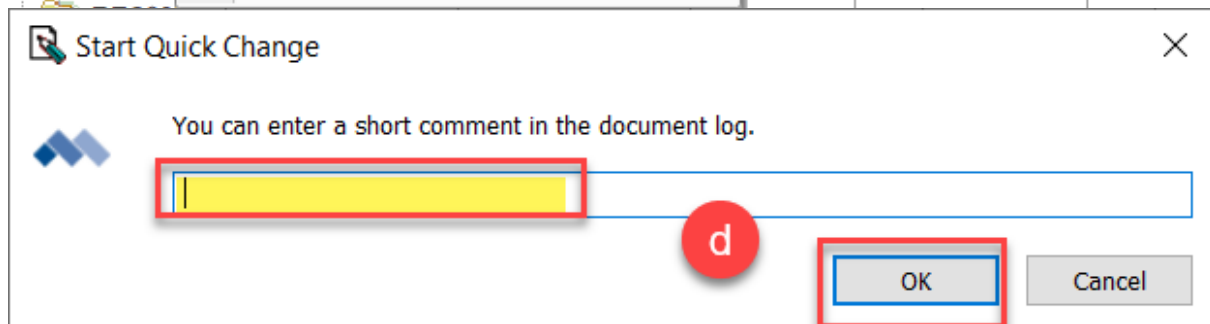
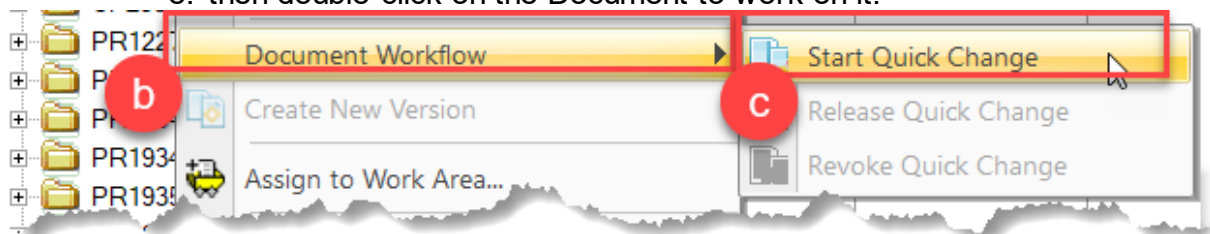
To Start a Quick Change:

1. Navigate to the document you are going to modify. You can use Nav Views or the Find Toolbar.
2. Select the file.



3. Start the Quick Change by using the right-click method (use for either external or internal documents)

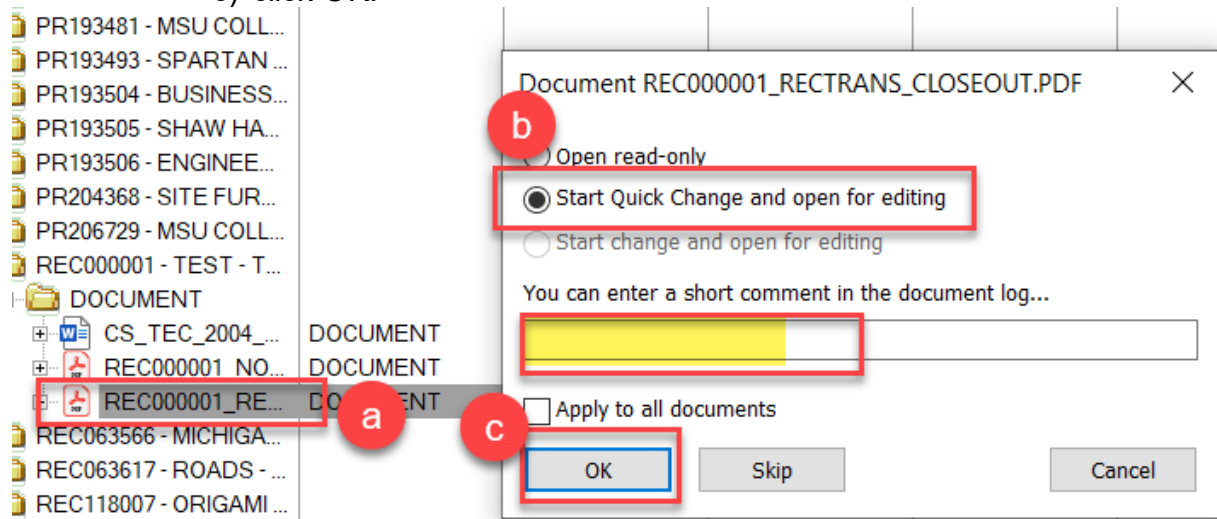
- Right-click on the file
- Select Document Workflow
- Start Quick Change
- click OK
- then double-click on the Document to work on it.



Or,

4. Start the Quick Change by using the double click method (only for internal documents)

- a) Double click on document
- b) Select 'Start Quick Change and open for editing'
- c) click OK.

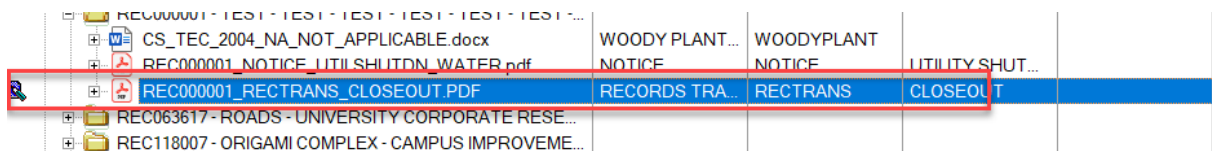


4.2.2 Modify Content

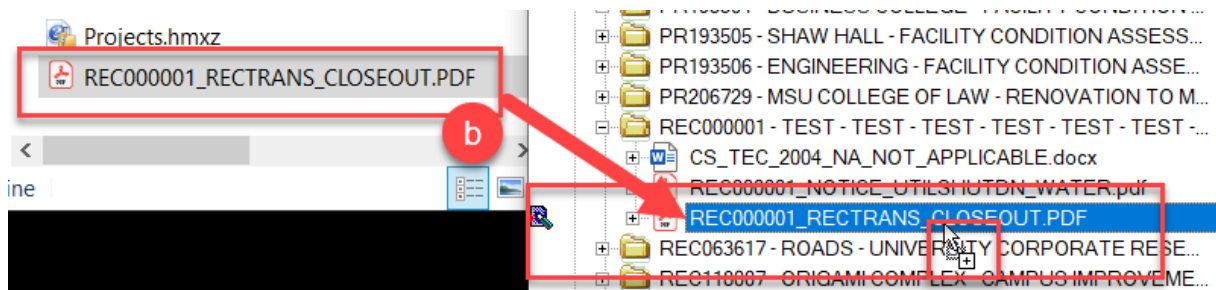
To Make Modifications:

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 (the document has to be under a quick change)

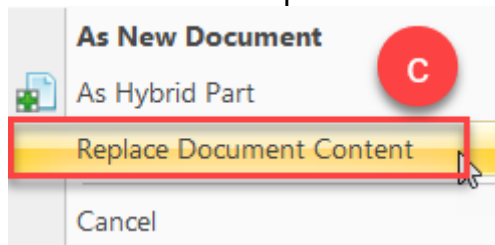
a. Select the Document in Meridian to Replace



- b. Drag the new document into Meridian ON TOP of current Document and release the mouse.



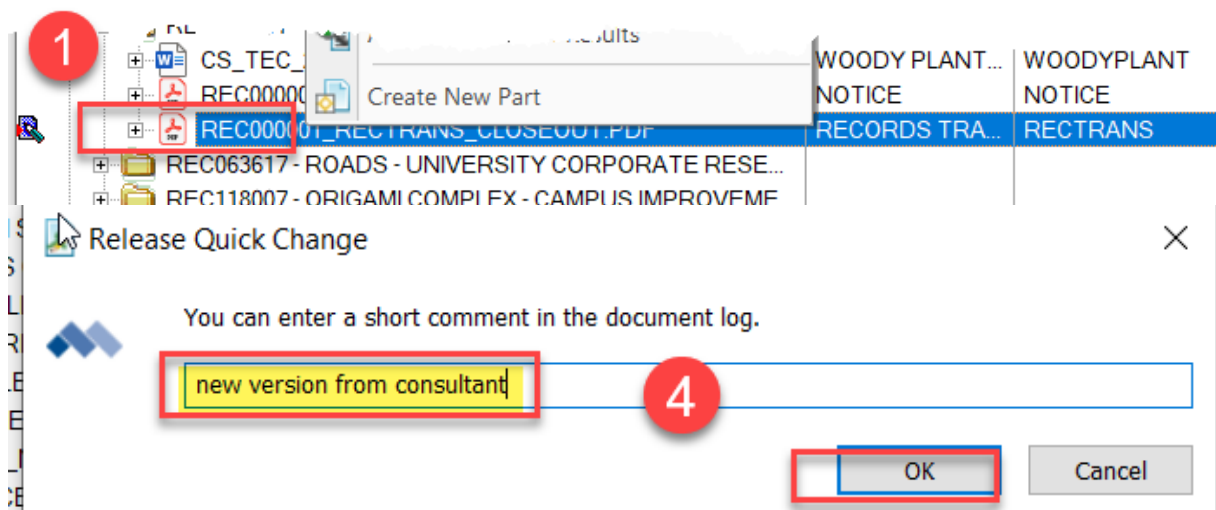
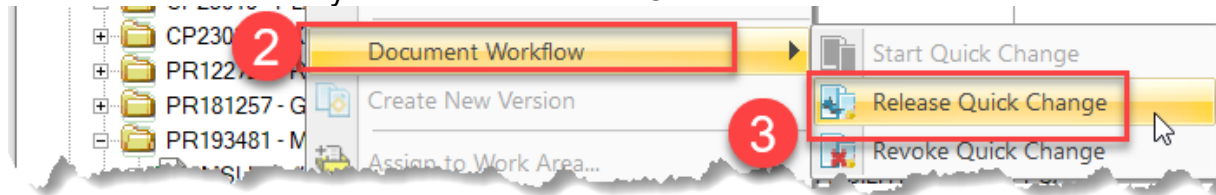
c. Select 'Replace Document Content'



4.2.3 Release Quick Change

To Release the Quick Change:

1. Select the document(s) and right-click
2. Select 'Document Workflow'
3. Then 'Release Quick Change'
4. Enter a comment if you'd like to and click 'OK'



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

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.

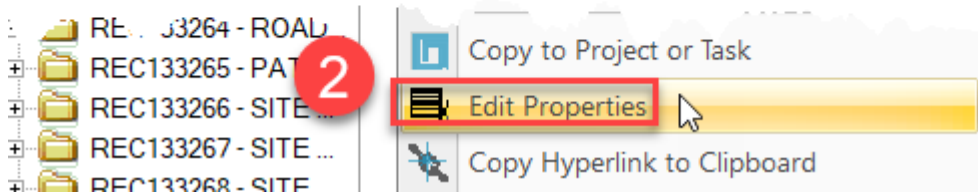
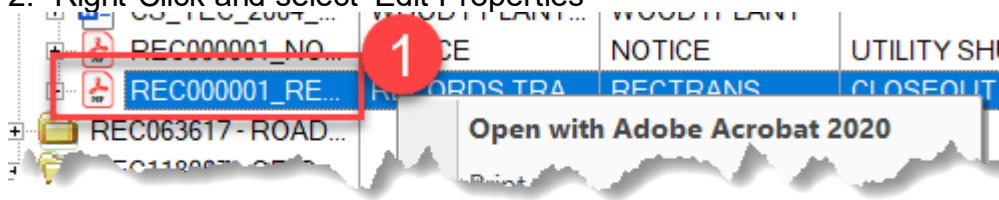
*****Editing properties does NOT change the document content, only the indexed information.*****

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 and select 'Edit Properties'



3. The Wizard will come up, replace any information you need to change.
4. Click 'Finish'

Create 'REC000001_RECTRANS_CLOSEOUT.PDF' - Enter/Edit Properties

Project Document | General | Notes

Sub Class RECTRANS RECORDS TRANSMITTALS

Sub Class Detail CLOSEOUT CLOSEOUT

CSI SubDivision

Security Level PB PUBLIC

Floor(s)

Description bid pack 1

File Suffix BID PACK 1

Originator INTERNAL

Source Company CHRISTMAN CHRISTMAN

Orig. FileName

MSU File Name REC000001_RECTRANS_CLOSEOUT_BID PACK 1

Document Date 9 /19/2023

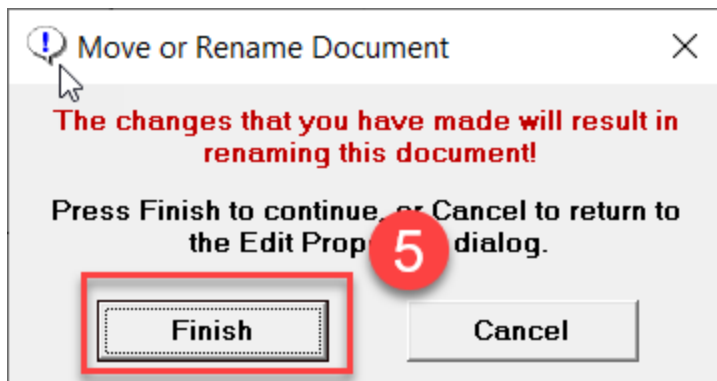
File Name: REC000001_RECTRANS_CLOSEOUT_BID_PACK_1

View

Store as My Defaults

Finish Cancel

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



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

5 Extras

5.1 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

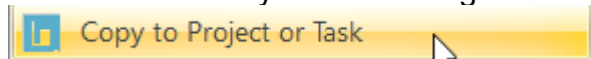
When you are adding and modifying documents in the Operational vault, you will have to perform these actions.

5.2 Best Practices & Shortcuts

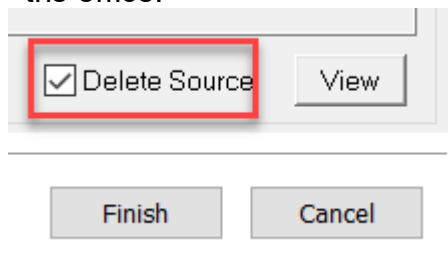
There are certain things to remember that can make using Meridian easier.

5.2.1 Ensuring use of most current document**Copy to Project or Task:**

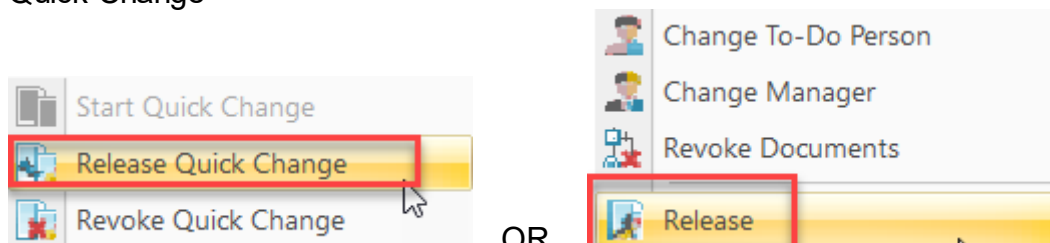
- When working in the Operational Vault, use copy to project or task feature to use a template to start a document or drawing from.
- This will ensure you are starting from the most current version.

**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:**

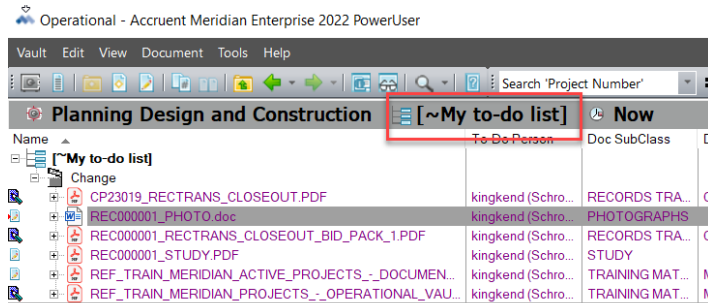
- Remember to 'Release' the document/drawing into the Operational Vault when you are done modifying it.
- If you don't, other users won't be able to have access to the most current version.
 - if you created the file within Meridian, it will be 'Release'
 - If you added it by any other method or are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



5.2.2 Nav View Shortcuts

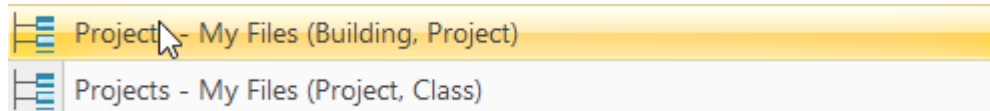
My To-Do List:

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



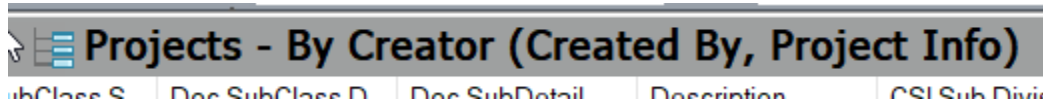
'My Files' Nav Views:

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



'By Creator' Nav View:

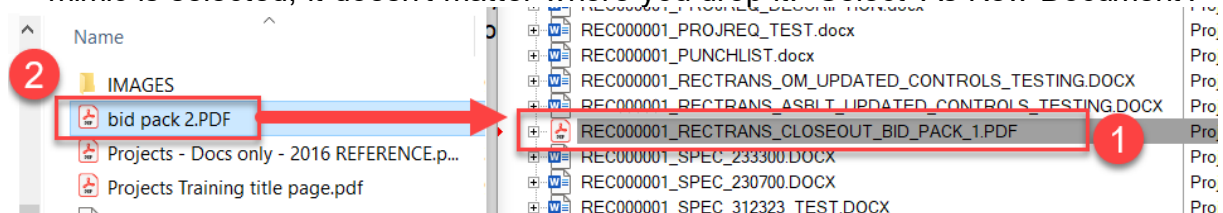
- Use this nav views to locate which files were added by a certain user to the Projects area in Meridian.

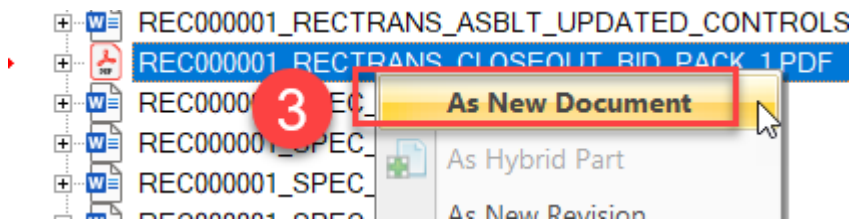


5.2.3 Current Selection adding option

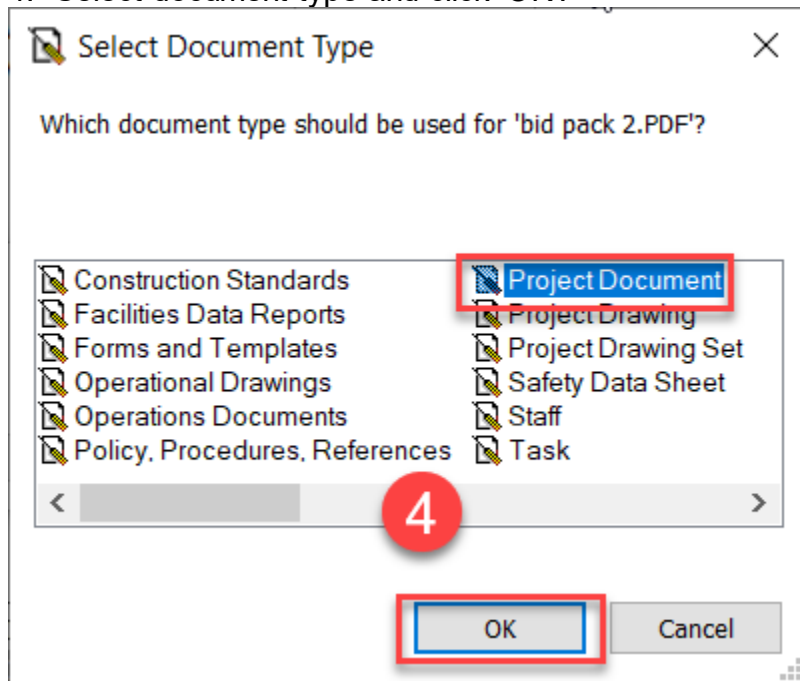
Current Selection: Helps expedite the adding process if you are adding multiple documents or drawings with some of the same attributes.

1. Search for a file or add the file using normal procedure. (if Adding, Release it!!!)
2. Make sure the file is selected. Make sure it is the ONLY file selected!!!
3. 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'.

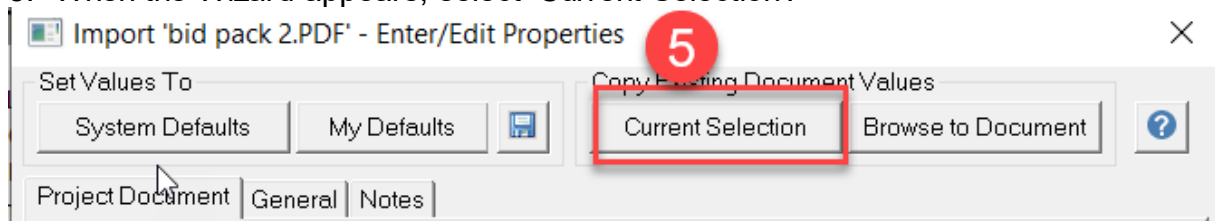




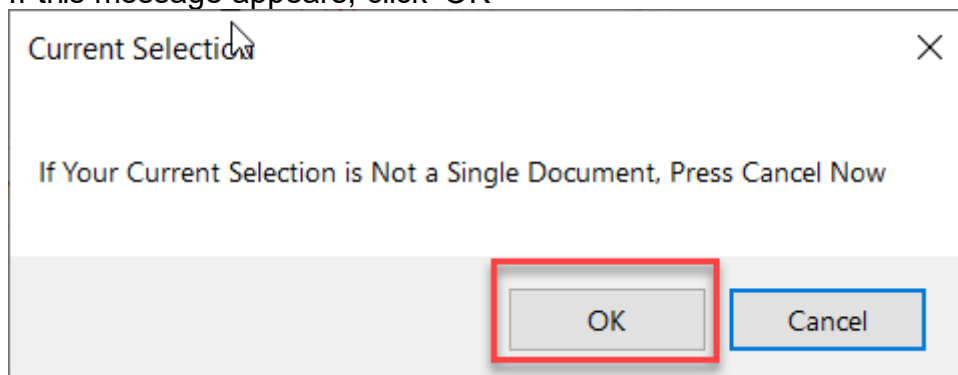
4. Select document type and click 'OK'.



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



If this message appears, click 'OK'



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

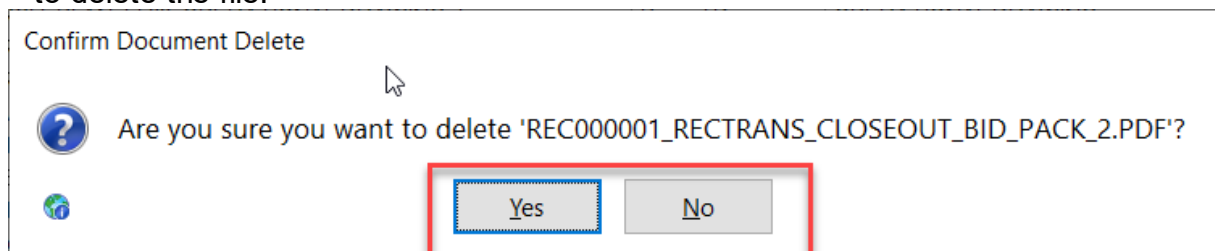
5.3 Deleting Documents & Drawings

Everyone that has permissions to add files to the Operational Projects will have permission to Delete files from the Operational 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.

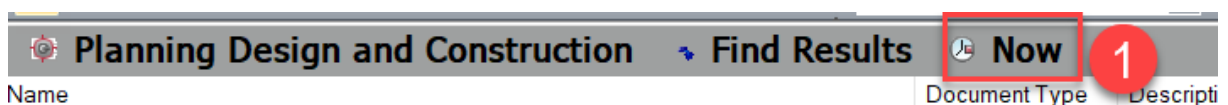
- When prompted, select 'Yes' or 'No' based on whether or not you are sure you want to delete the file.



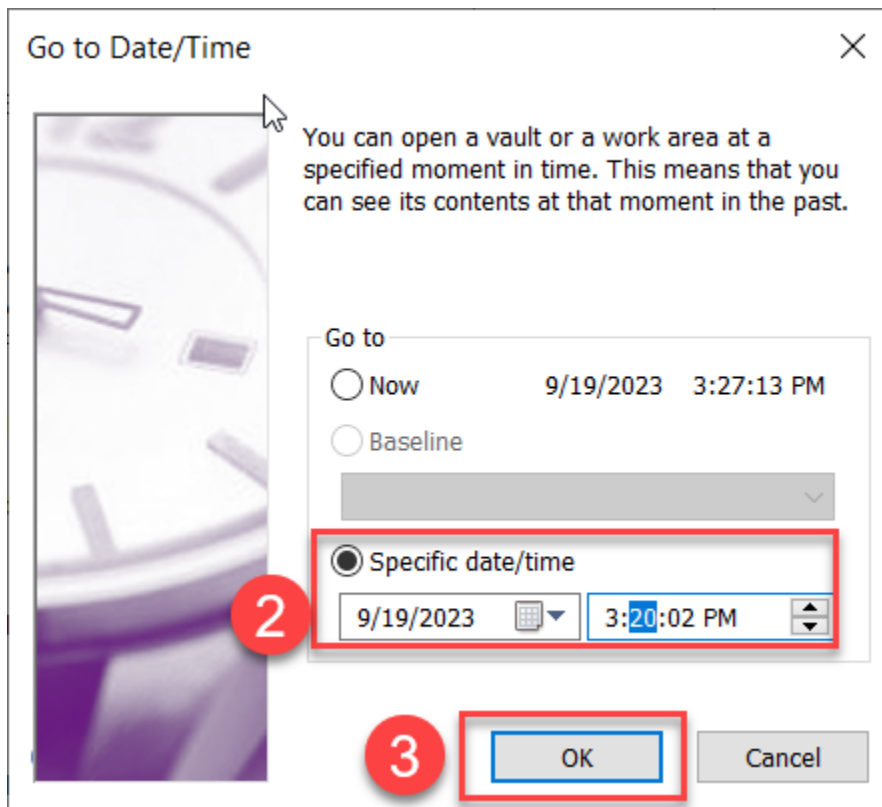
The file will now be removed from the folder in Meridian.

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

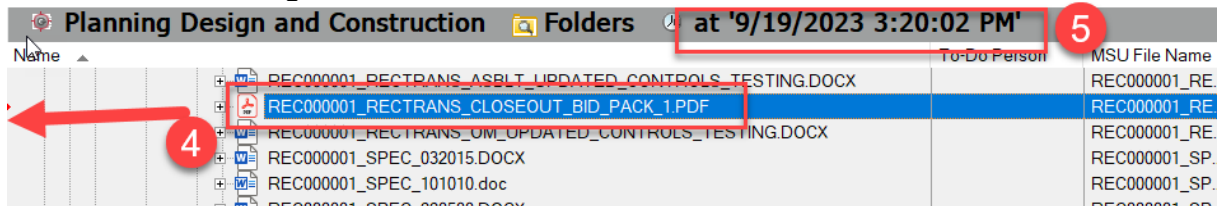
1. Click on 'Now'



2. Select Date/Time
3. Click 'OK'

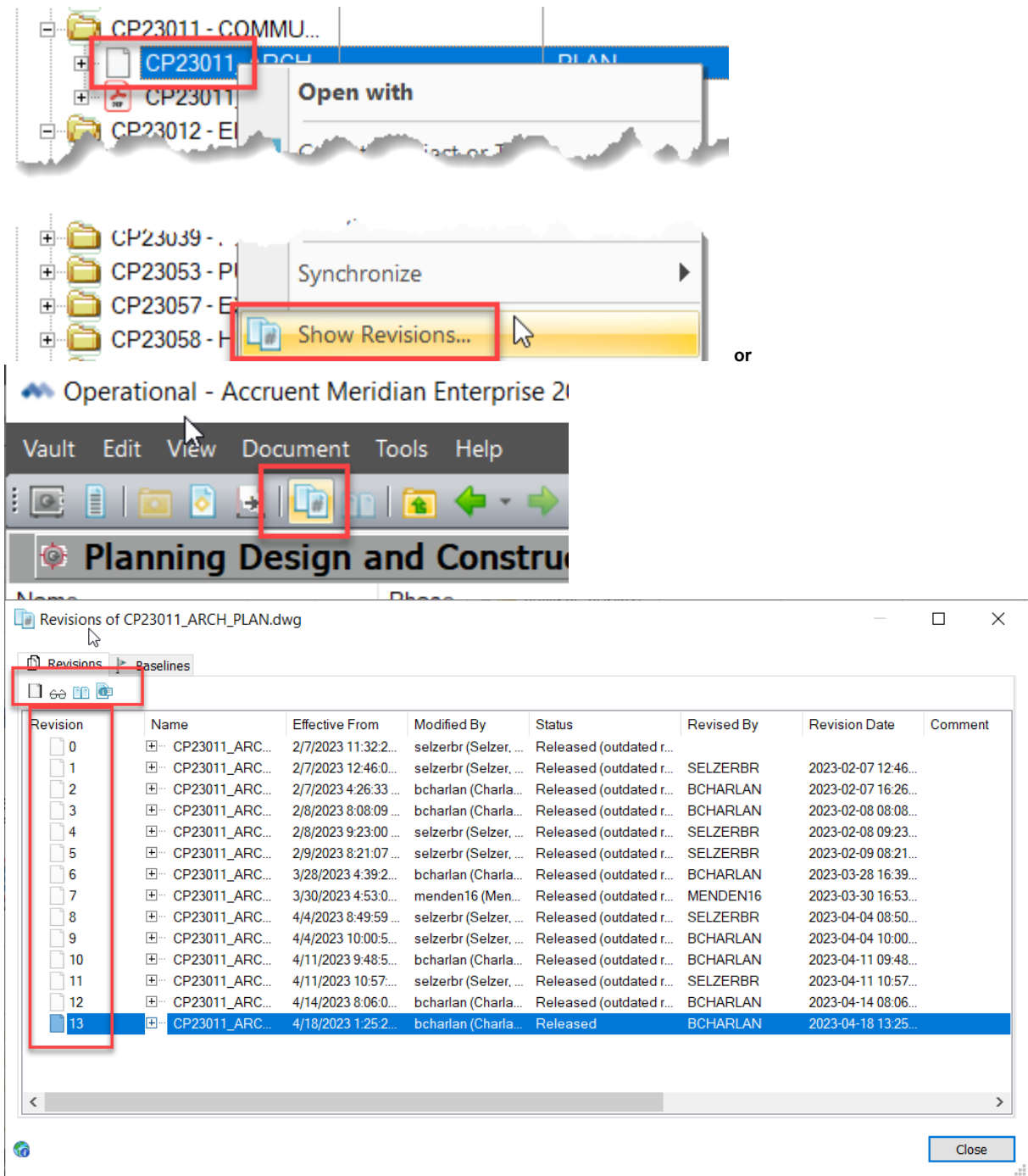


4. Drag the file out of Meridian and re-add it by Drag & Drop method of adding (Drag & Drop from Outside Meridian)
5. You will have to go to 'Now' to re-add.

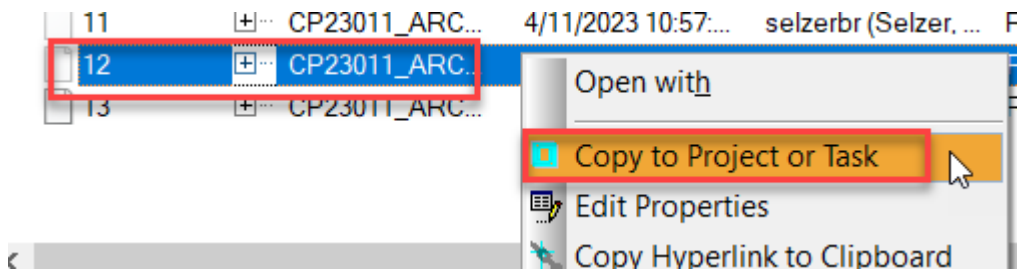


5.4 Revision History

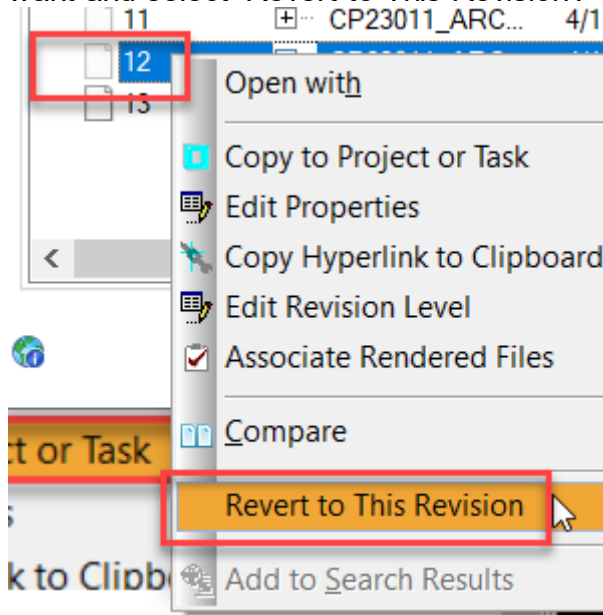
As long as the file is stored in Meridian, the revision history will be stored and updated whenever the file is modified and you will be able to get to the previous version of the file.



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



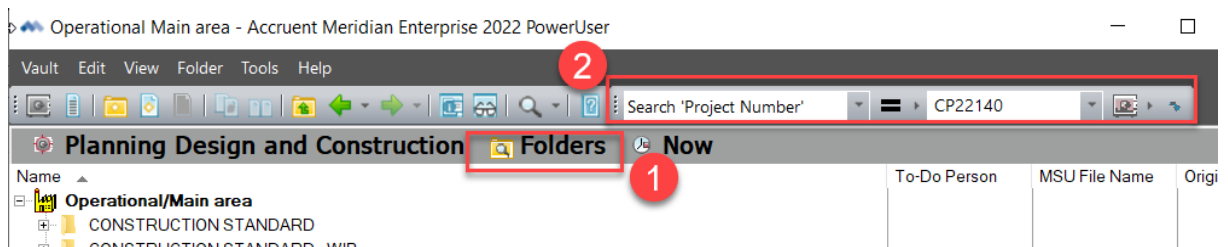
To revert to a previous version of the file to a Project, right click on the version you want and select 'Revert to This Revision':



This version will become the new current version and will need to be released.

5.5 Searching

1. Nav Views - pre-determined searches administrators set up using indexing properties.
2. Basic Search (Find Toolbar) - user can type what property they would like to search for or select from drop down lists.



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

