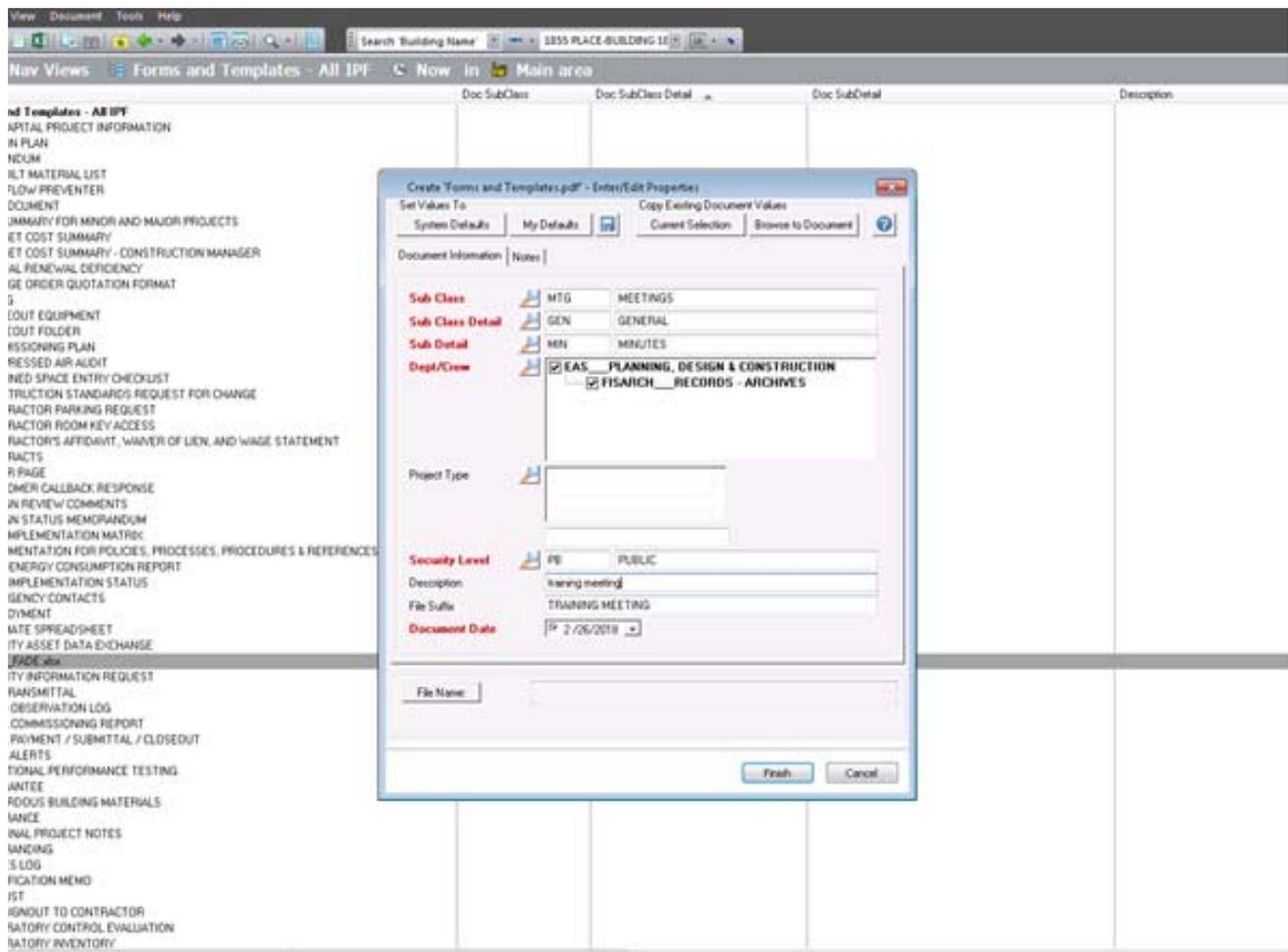


Forms and Templates Editor

This manual will provide training for accessing, adding and modifying Forms and Templates in the Meridian Document Management System on the Campus of Michigan State University.



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1 Forms and Templates

The Forms and Templates are found within the Operational Vault in Meridian. A select group of individuals from each IPF department have permissions to add and modify the files in Forms and Templates. Permissions in the Forms and Templates are based on which department and crew you are a part of.

Some of the Forms and Templates are published to the IPF webpage and the capital projects procedures webpage. If the file is being worked on, the changes won't be published to the web until the file is 'released'.

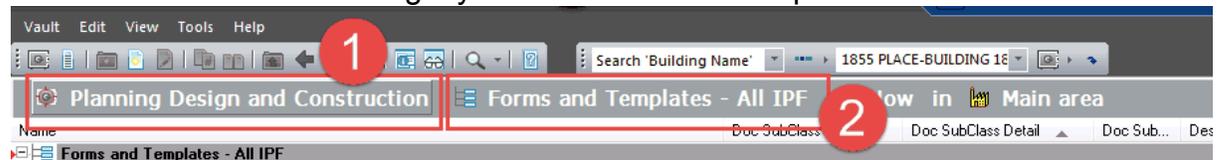
The same form or templates can be used across different departments at IPF. In Meridian, the 'primary crew' assigned to the file is the group that has permissions to edit the file. The other crews have view access to the file.

Name	Doc SubClass	Department	Crew Code	Project Type Search	Subn
Forms and Templates - All IPF					
A3 - CAPITAL PROJECT INFORMATION	A3 - CAPITAL PROJEC...	ENGINEERING AN...	DES	,MAJOR,MINOR,PU...	11/2
FT_A3CPINF0.pub					
ACTION PLAN					
FT_ACTNPLN.docx	ACTION PLAN	SUPPORT SERVICES	HR		10/3
FT_ACTNPLN_IPF_GOALS.pdf	ACTION PLAN	SUPPORT SERVICES	HR		10/3
FT_ACTNPLN_UPDATE_MEMO.docx	ACTION PLAN	COMMUNICATIONS	COMM		5/8/2
ADDENDUM					
FT_ADD.docx	ADDENDUM	ENGINEERING AN...	AS	,MAJOR,MINOR,PU...	11/1
AS-BUILT MATERIAL LIST					
FT_ASBMATLST.pdf	AS-BUILT MATERIAL L...	ENGINEERING AN...	CONST	,FACULTY READIN...	12/8
BACKFLOW PREVENTER					
FT_BCKFLOWPRV_LIST_10_1_BCKFLOW_PREVENTER_INVENT.pdf	BACKFLOW PREVENT...	ENGINEERING AN...	CONST	,PRE-CONSTRUCTI...	11/6
FT_BCKFLOWPRV_TEST_11_1_BCKFLOW_PREVENTER_TEST_R.pdf	BACKFLOW PREVENT...	ENGINEERING AN...	CONST	,PRE-CONSTRUCTI...	11/6
BID DOCUMENT					
FT_BIDDOC_APPRVLICUST.pdf	BID DOCUMENT	ENGINEERING AN...	DES	,MAJOR,MINOR,PU...	4/4/2
FT_BIDDOC_CHKLIST_BID_SET_DOCUMENTS_AND_ADDENDA.docx	BID DOCUMENT	ENGINEERING AN...	AS	,MAJOR,MINOR,PU...	2/20
FT_BIDDOC_CHKLIST_DELETE.docx	BID DOCUMENT	ENGINEERING AN...	AS	,MAJOR,MINOR,PU...	2/23

2 Accessing Forms and Templates

Locate the file in the Meridian Operational Vault. Use the 'Scopes' and 'Nav Views' to navigate to the document quickly.

1. Pick the 'Scope' for your department or crew.
2. Pick a 'Nav View' that will get you to the forms and templates.



2.1 Modifying a Form/Template

Because one single form can be used by multiple crews, when you use the Forms and Templates Nav Views, pay attention to the 'Crew Code' column. If your crew is not displayed there, you do not have permissions to modify that Form.



2.1.1 Start a Quick Change

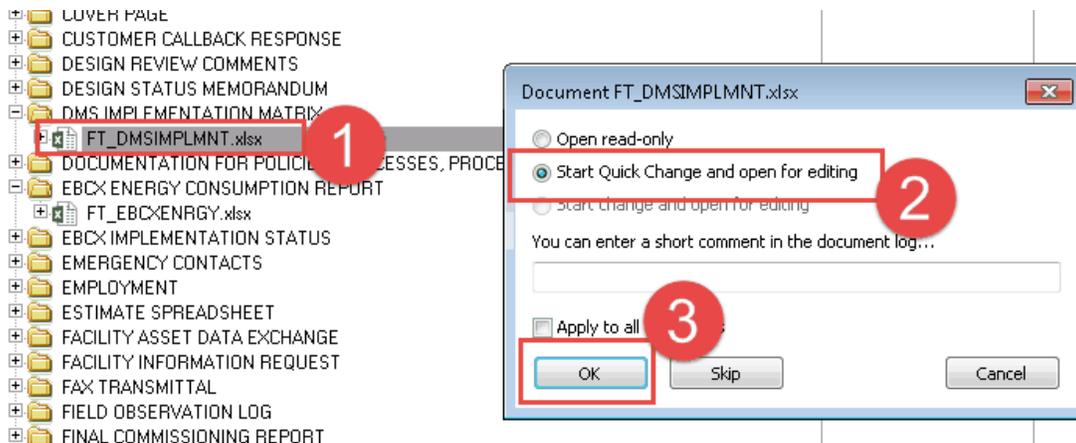
Once you have located the form/template that needs to be modified, you will need to 'Start a Quick Change'. This action will check the document out to you and prevent other users from being able to modify the document while you update it. Users will still be able to use the document as it was BEFORE you started the quick change.

There are 2 different ways to 'Start a Quick Change':

- Double clicking - shorter way
- Using shortcut menu - longer way

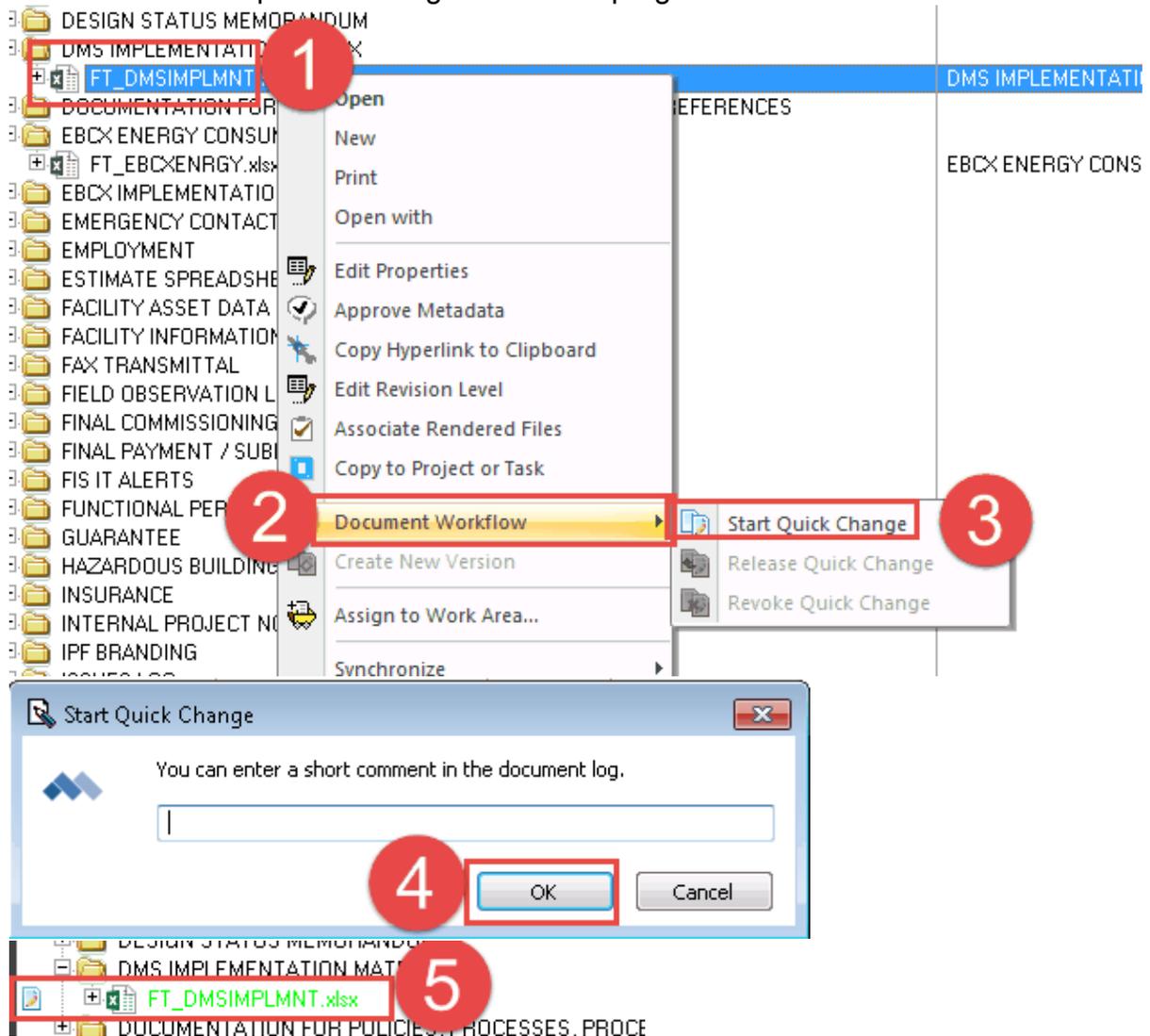
Double clicking (*shorter way*)

1. Double click on the file.
2. Select 'Start Quick Change and open for editing'.
3. Click 'OK'.



Using shortcut menu (*longer way*)

1. Right click on file to be modified.
2. Select 'Document Workflow'.
3. Select 'Start Quick Change'.
4. Click 'OK'.
5. Double click to open for editing in the native program.



2.1.2 Modifying the Document

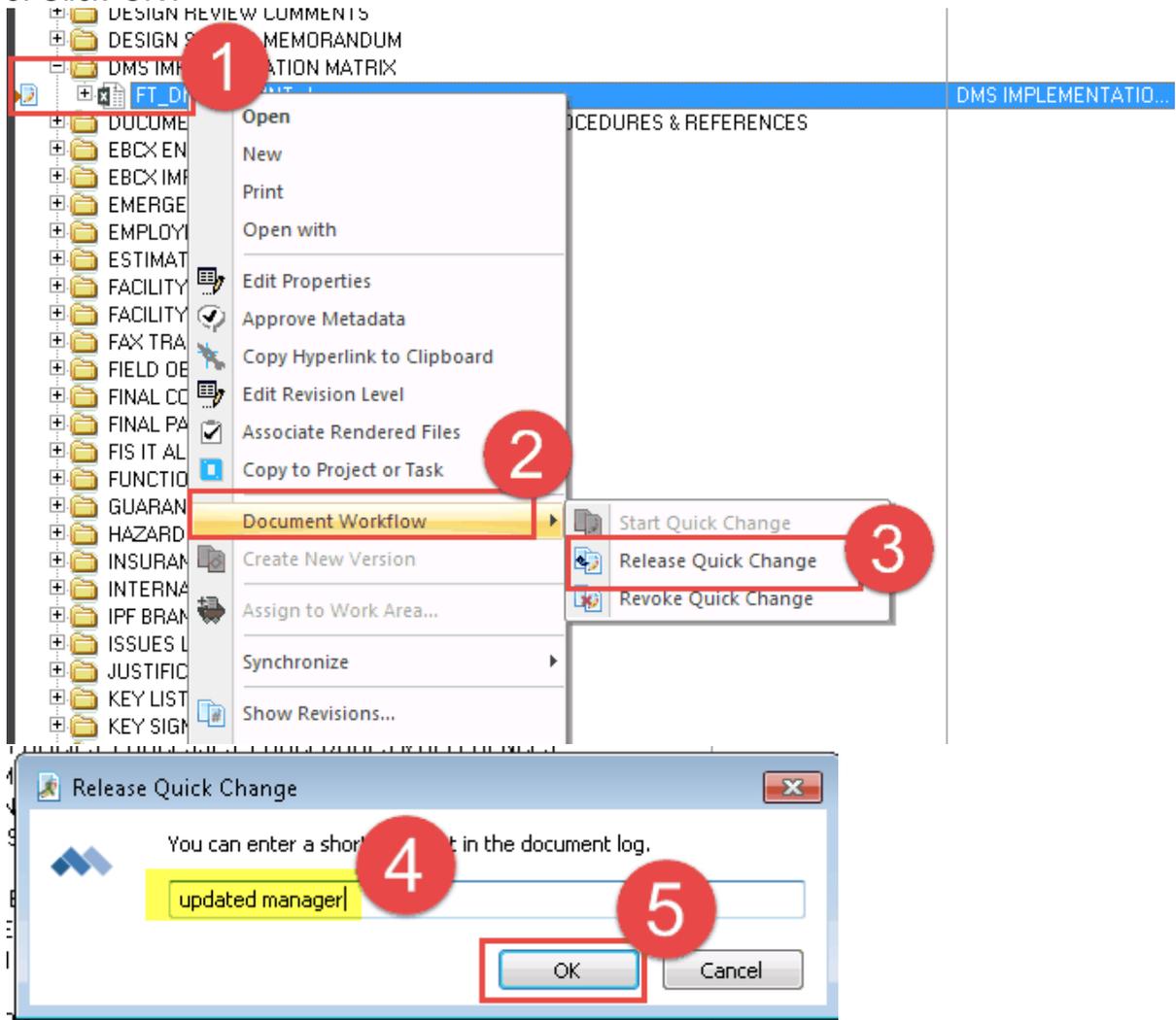
1. Make any updates/changes to the document in the native program.
2. Save the document

When you save the document, it will automatically save the changes you made into Meridian. Once the Document is Released (the next steps), the changes will appear for all users to see.

2.1.3 Release the Quick Change

For users to be able to view and use the modified form or template, you will need to 'Release the Quick Change'. By selecting 'Release Quick Change', you are telling Meridian your changes are completed and the modified file can be published to the web.

1. Right-click on the document.
2. Select 'Document Workflow'.
3. Select 'Release Quick Change'.
4. Enter a comment (optional - this will be stored in the revisions log).
5. Click 'OK'.



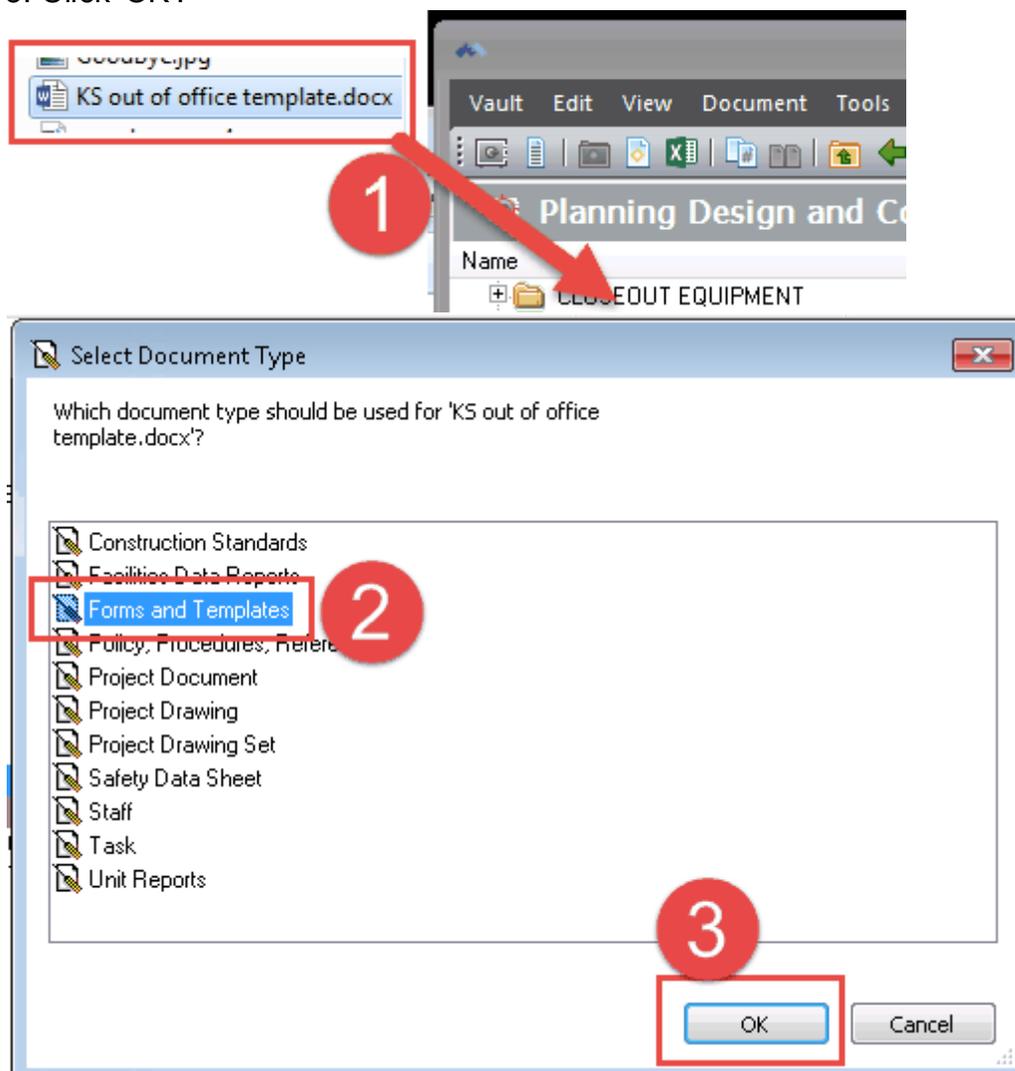
2.2 Adding a Form/Template

To add a form or template to Meridian:

- You need to have permissions for your crew/department to add to Meridian.
- You will need to be in the Operational Vault and the scope for your crew/department.
- You do NOT need to search in Forms and Templates first.
- The document should already be created outside Meridian
- Make sure the name of the Form or template is already available as a subclass, subclass detail or subdetail in Meridian.
 - If it is not, send a request to fisrequests@ipf.msu.edu to get the value added to Meridian first.

Once you know the name is in the list of values and have the document created:

1. Drag and drop the document into Meridian.
2. Select the 'Forms and Templates' document type.
3. Click 'OK'.



2.2.1 Describe the Document

Fill in the Wizard with the appropriate metadata.

1. Use the magnifying glass icons to access lists of values.
2. Select the sub class (if it is not there, contact FIS). Some subclasses will have a subclass detail and subdetail.
3. See Department/Crew selection instructions (next section).
4. Project type is used for forms and templates that are related to conducting construction projects. Selecting the correct project types ensures these forms will display in the project specific Nav Views.
5. Description is optional. File Suffix will use a 'clean' version of the description field. Do not type in file suffix.
6. 'Delete Source' ensures Meridian is the only source for the current version of this form or template.
7. Click 'Finish'

Import 'KS out of office template.docx' - Enter/Edit Properties

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

Document Information | Notes

Sub Class 000 OUT OF OFFICE

Dept/Crew EAS_PLANNING, DESIGN & CONSTRUCTION
 FISARCH_RECORDS - ARCHIVES
 FISGEN_RECORDS - GENERAL

Project Type

Security Level PB PUBLIC

Description FOR TRAINING

File Suffix FOR TRAINING

Document Date 2/26/2018

File Name:

Delete Source View

Finish Cancel

2.2.1.1 Department/Crew Selection

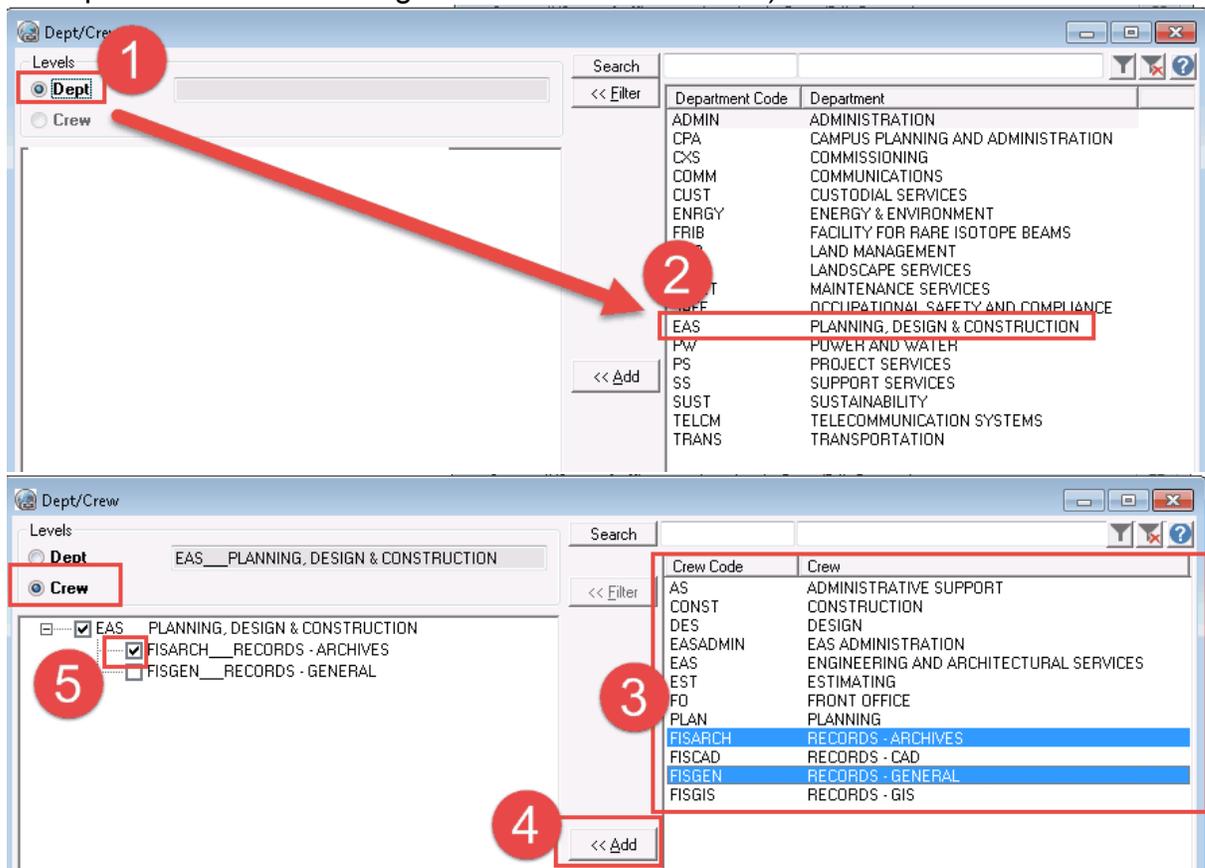
This field will determine two things...

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

2.2.1.1.1 One or Few Crews

For just one or a few crews:

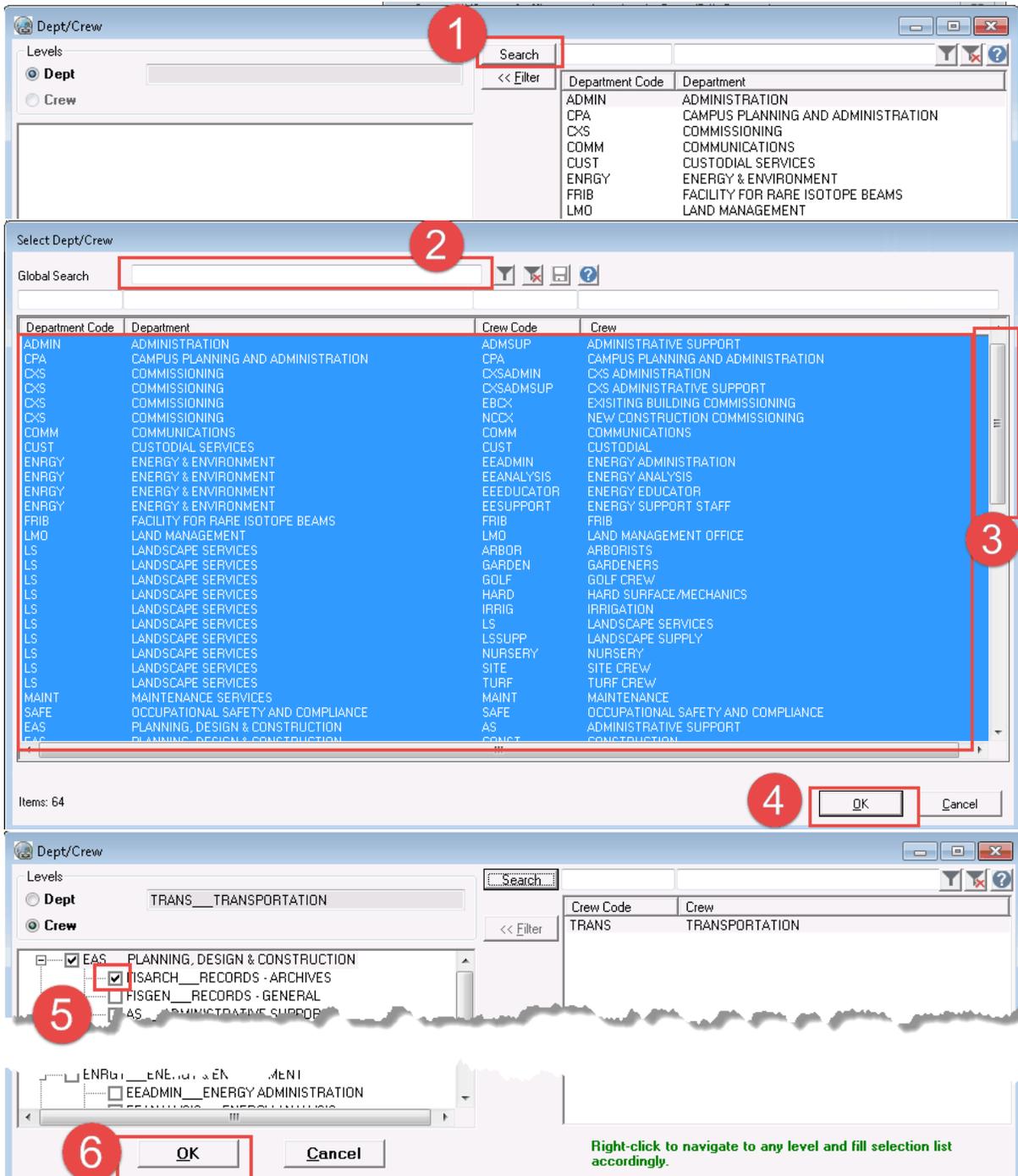
1. Once you are in the Department/Crew Selection tool, double click on a Dept to access their crew list.
2. Select the crews, then click '<<Add'.
3. Once you are finished adding Depts/Crews, select the 'Primary Crew' (the crew responsible for maintaining the document in Meridian).



2.2.1.1.2 Many or all IPF crew s

For many or all IPF:

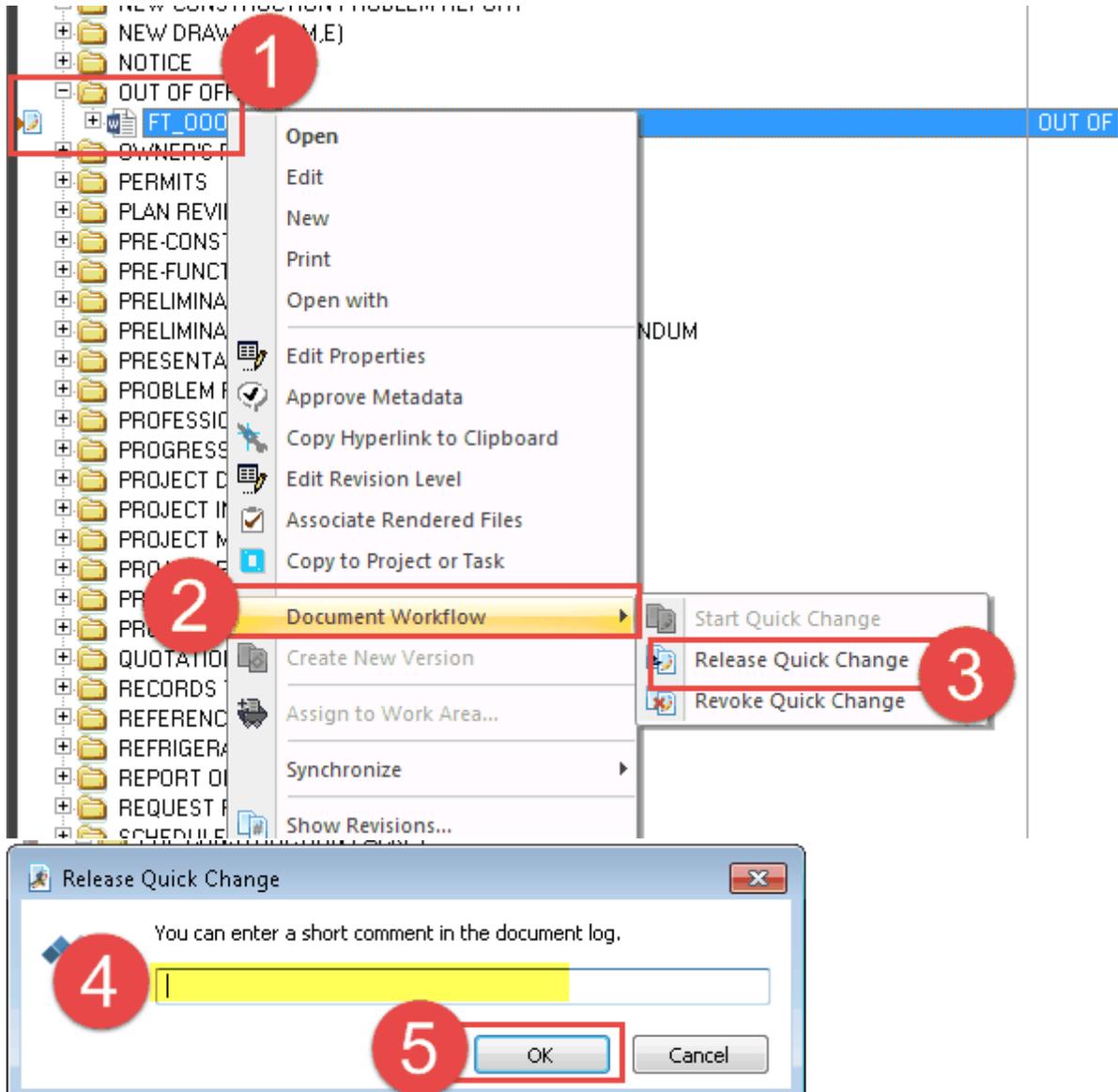
1. Click on 'Search'.
2. Use the 'Global Search' to filter on specific names.
3. Or, select all of the departments/crews (using the shift key and scroll bar).
4. Click 'OK'.
5. Select the 'primary crew'.
6. Click 'OK'.



2.2.2 Release

After adding a form or template to Meridian, you will need to 'Release' document for it to create the initial version in the system.

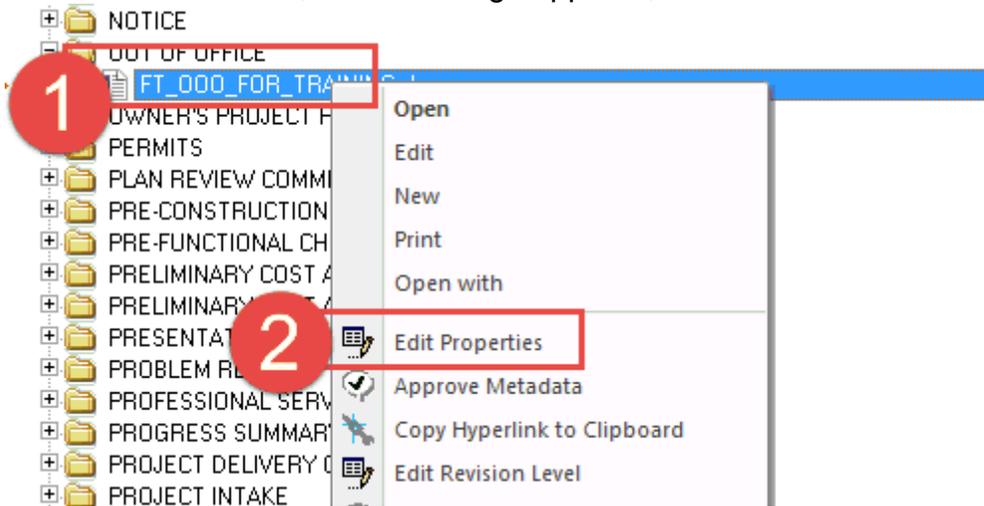
1. Right click on the file.
2. Select 'Document Workflow'.
3. Select 'Release' or 'Release Quick Change'.
4. Enter a comment for the revisions log (optional).
5. Click 'OK'.



2.3 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'.
5. Meridian may alert you that the change you made will result in the document being renamed or moved, if this message appears, click 'Finish'.



Create 'FT_000_FOR_TRAINING.docx' - Enter/Edit Properties

Document Information | Notes

Sub Class

Dept/Crew **EAS__ PLANNING, DESIGN & CONSTRUCTION**
 FISARCH__RECORDS - ARCHIVES
 FISGEN__RECORDS - GENERAL

3

Project Type

Security Level

Description

File Suffix

Document Date 2/26/2018

File Name:

4

5

Move or Rename Document

The changes that you have made will result in renaming this document!

Press **Finish** to continue, or **Cancel** to return to the Edit Properties dialog.