



## Purpose

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Instructions for Adding, editing and modifying Job Descriptions in Meridian.


## Participants

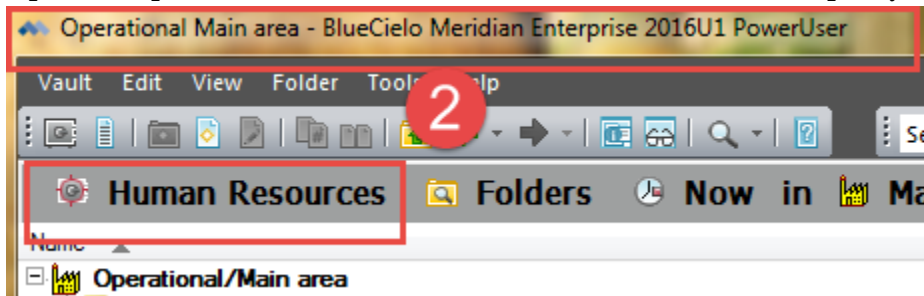
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Human Resources staff.

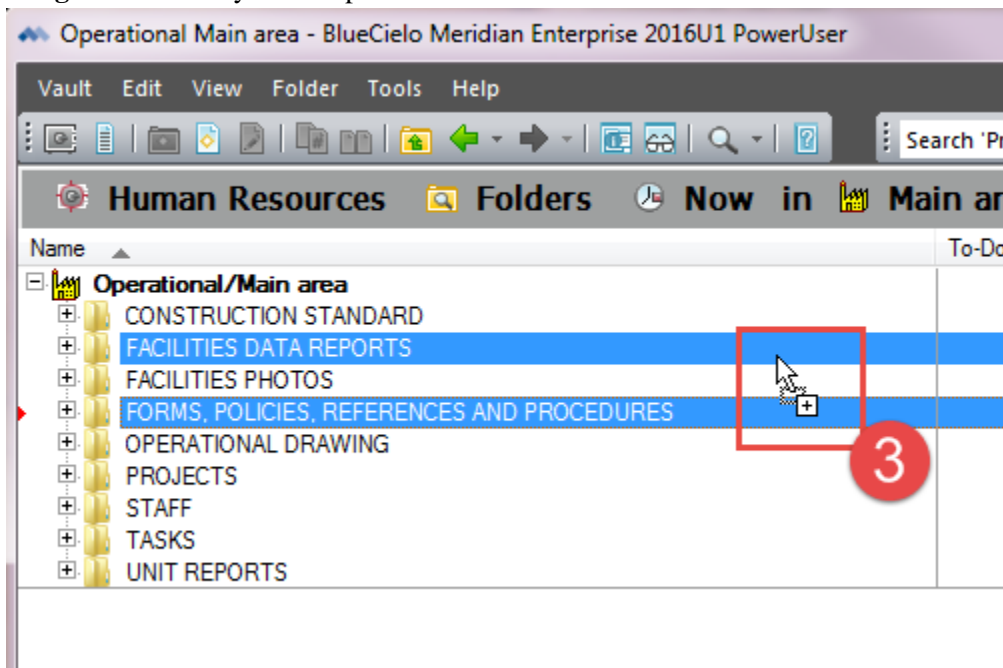
## Procedure for ADDING files

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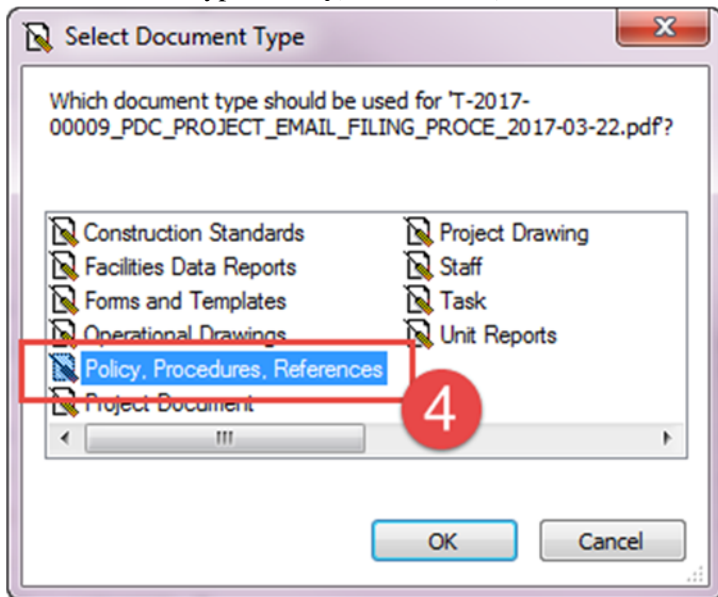
1. **Open Meridian**  **1** (Make sure you are using the correct version)
2. **Open the Operational Vault**, then select the **Human Resources Scope** if you aren't there already.



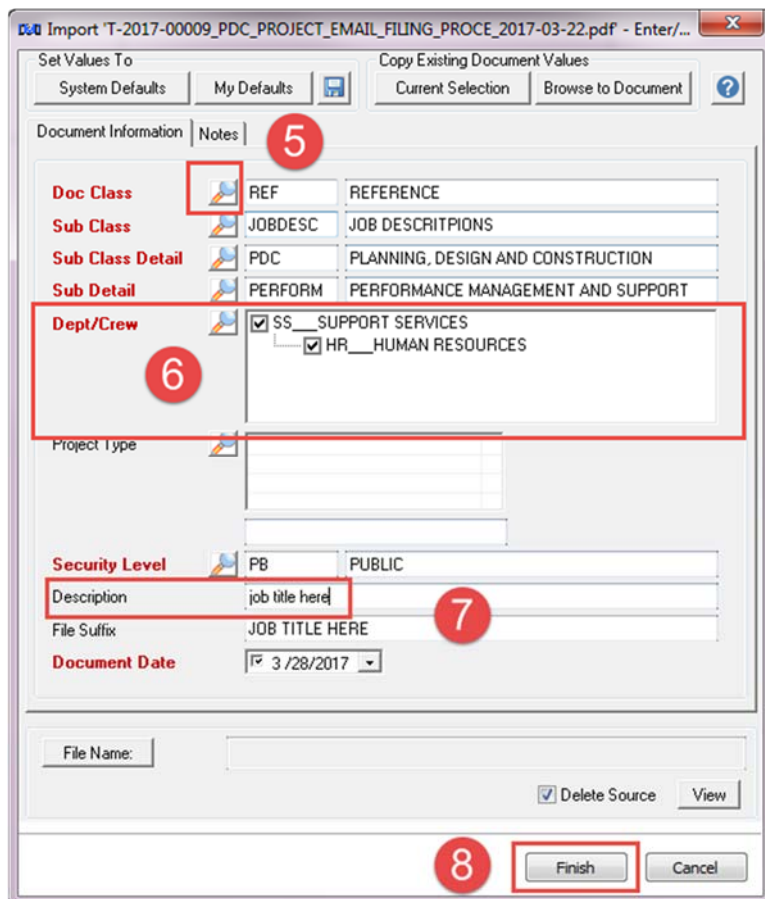
3. **Drag the file** from your computer into Meridian



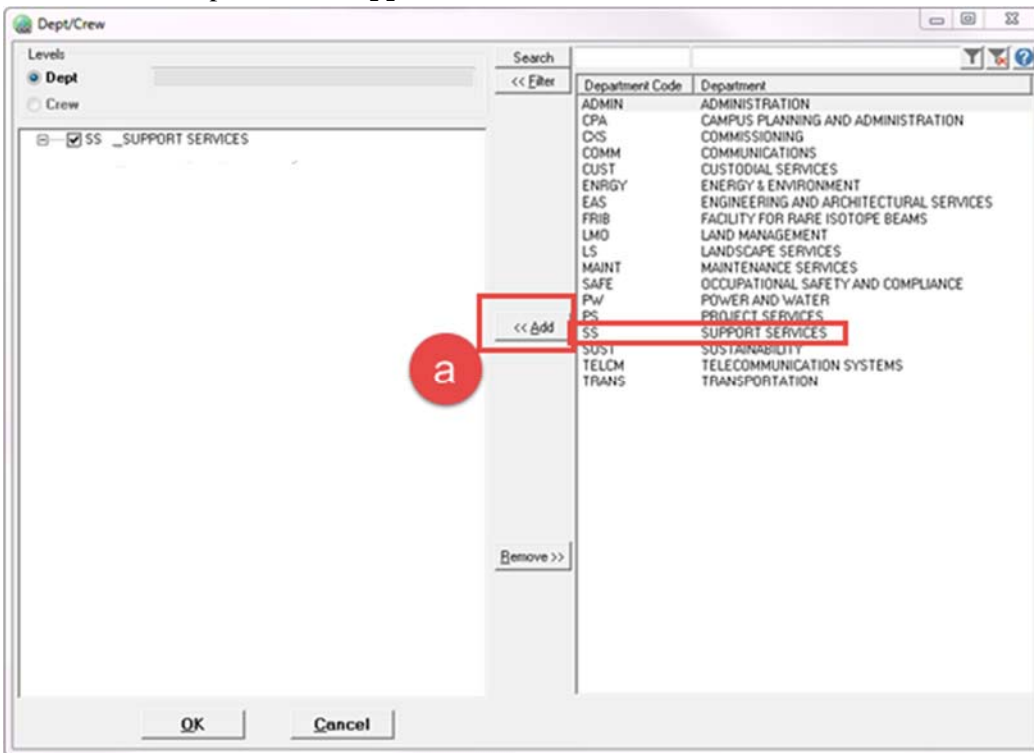
- Pick Document type: **Policy, Procedures, References**



- Fill in the Wizard.** Use the **magnifying glass** to select from the drop down list of values.
- For **Dept/Crew**: Human resources should be the primary crew because you will be the owner of the documents. Depending on who you want to see the documents in Meridian, you will need to select the appropriate crews. (see 6a below).
- Type the job title in the **description field**.
- Click **finish**

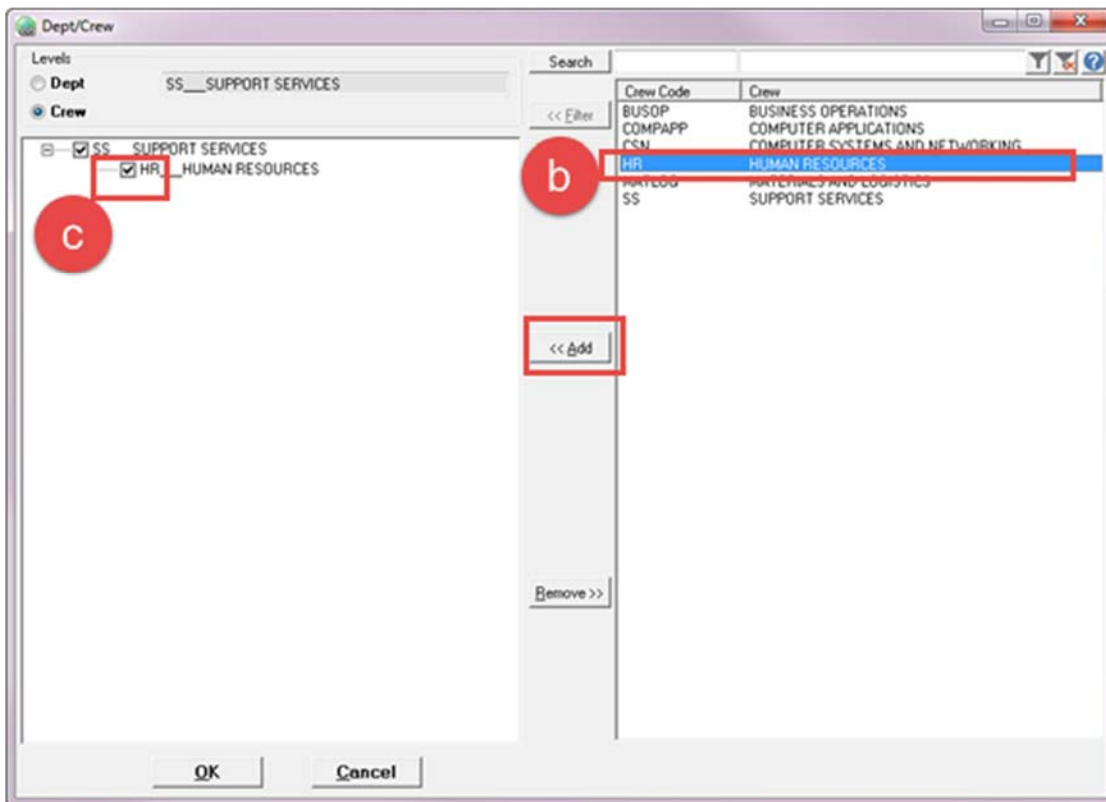


6a. Select the Department: **Support Services** and double click or '<<add'.



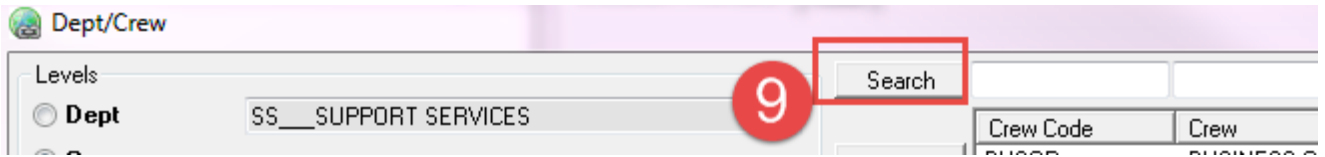
6b. Then select the crew of **Human Resources** and double click or '<<add'.

6c. **Check the box** next to Human Resources to make HR the owner of the document.



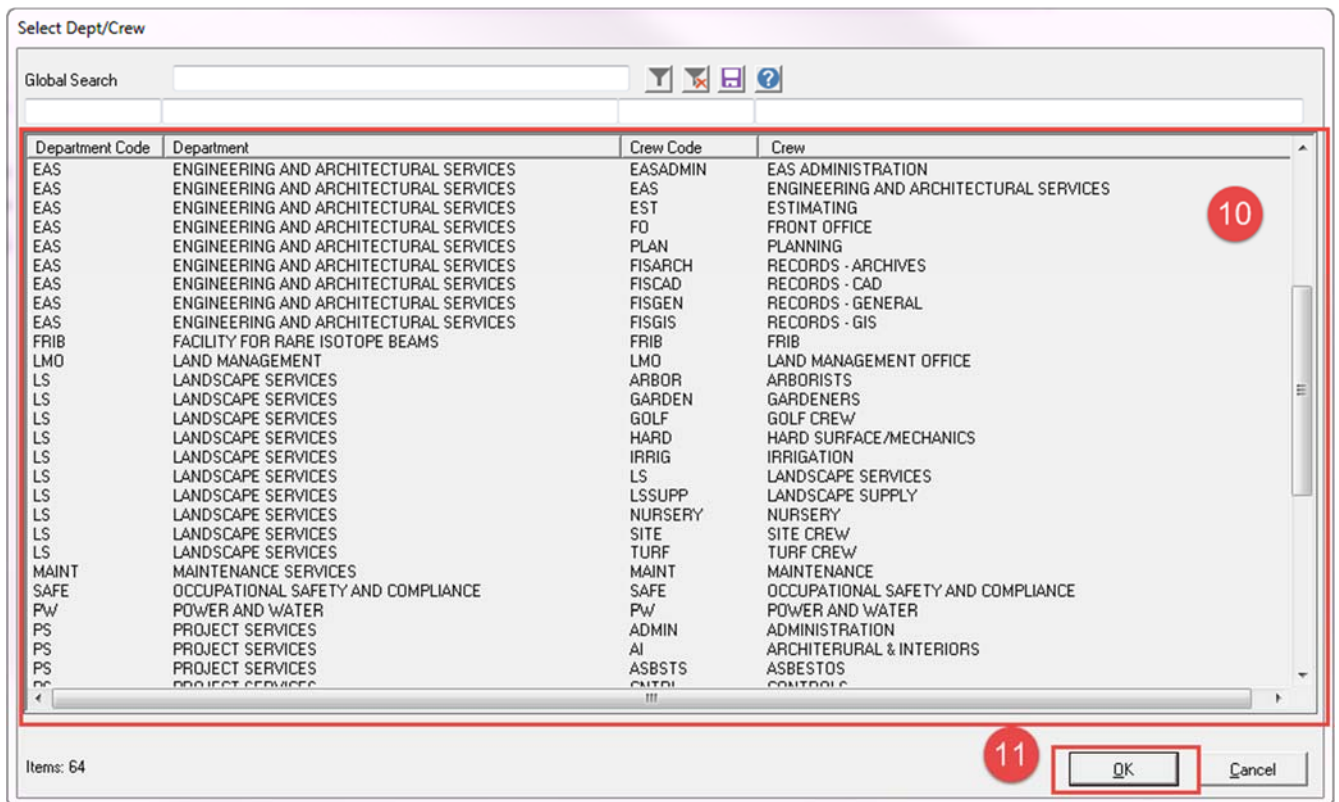
If you want to add multiple departments and crews, you can repeat the steps above for each specific one, without checking the box, or you can:

9. Click the **search** button

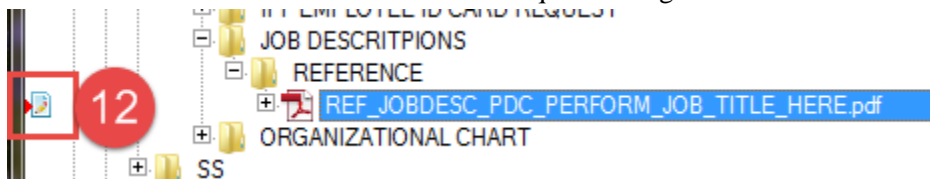


10. **Select all** the depts/crews that apply

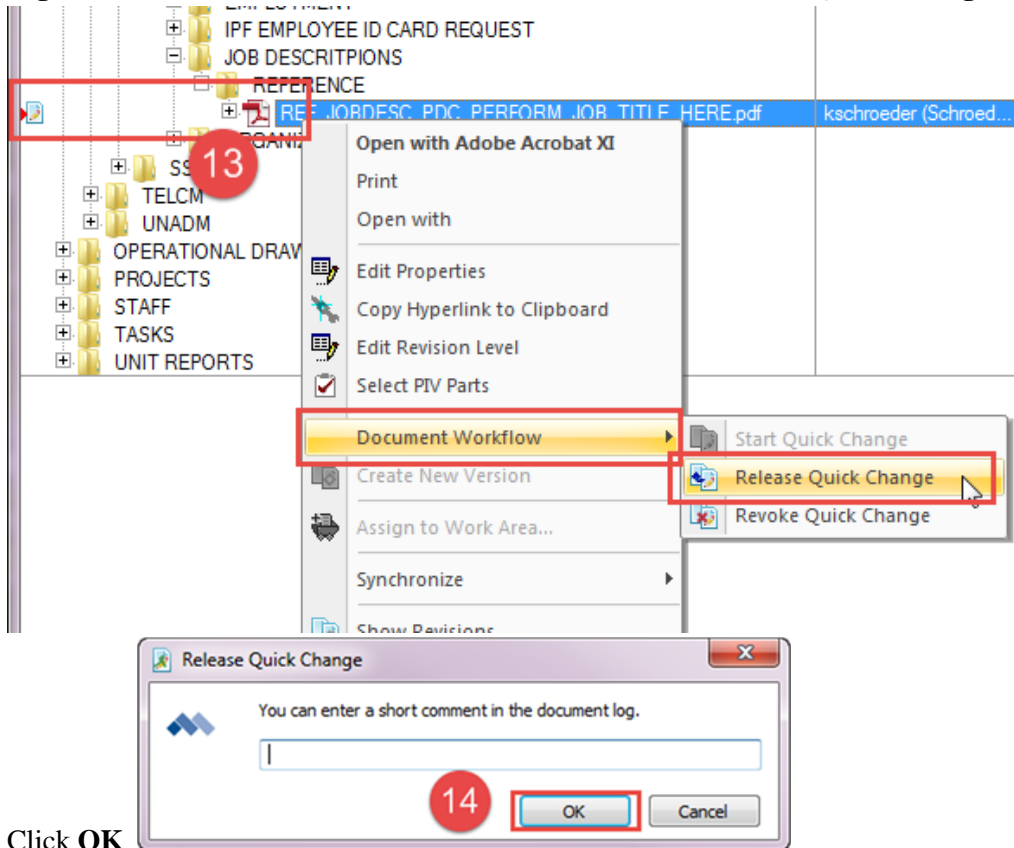
11. **click OK**



12. The document will now be in Meridian in a quick change state. To Release it:

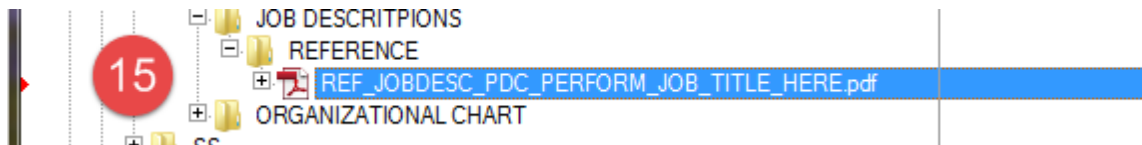


13. **Right Click**, then select **Document Workflow**, then select **Release Quick Change**.



14. Click **OK**

15. The document is now in Meridian.



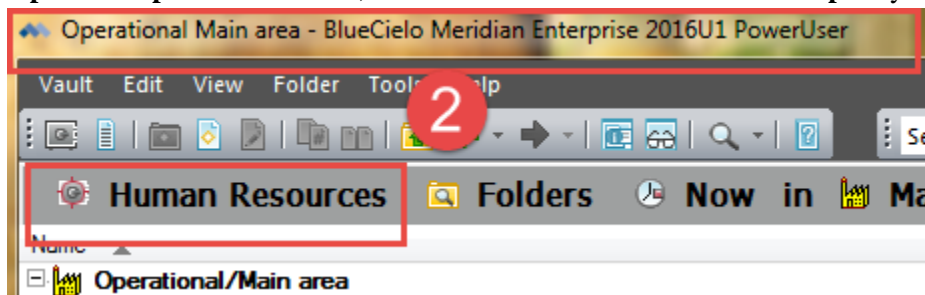
## Procedure for MODIFYING files

1. **Open Meridian**

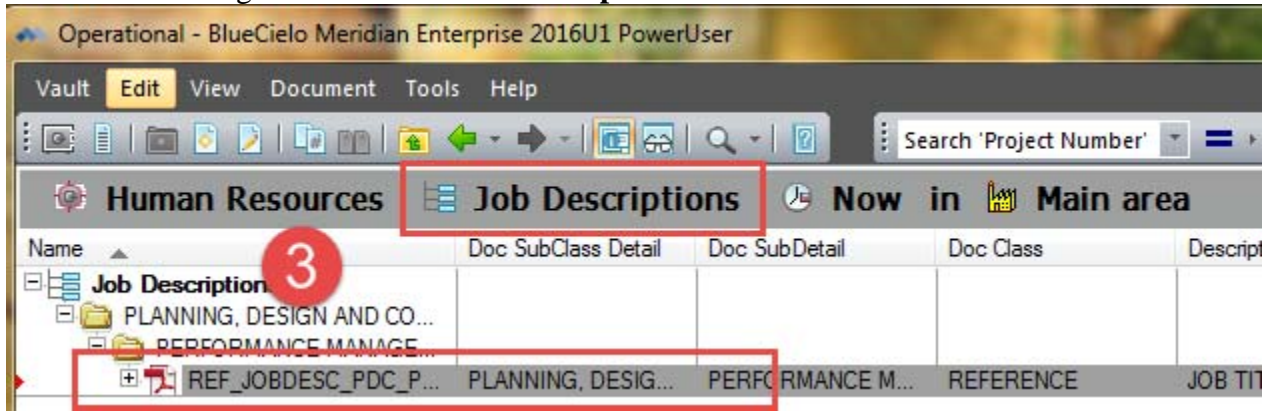


(Make sure you are using the correct version)

2. **Open the Operational Vault**, then select the **Human Resources Scope** if you aren't there already.

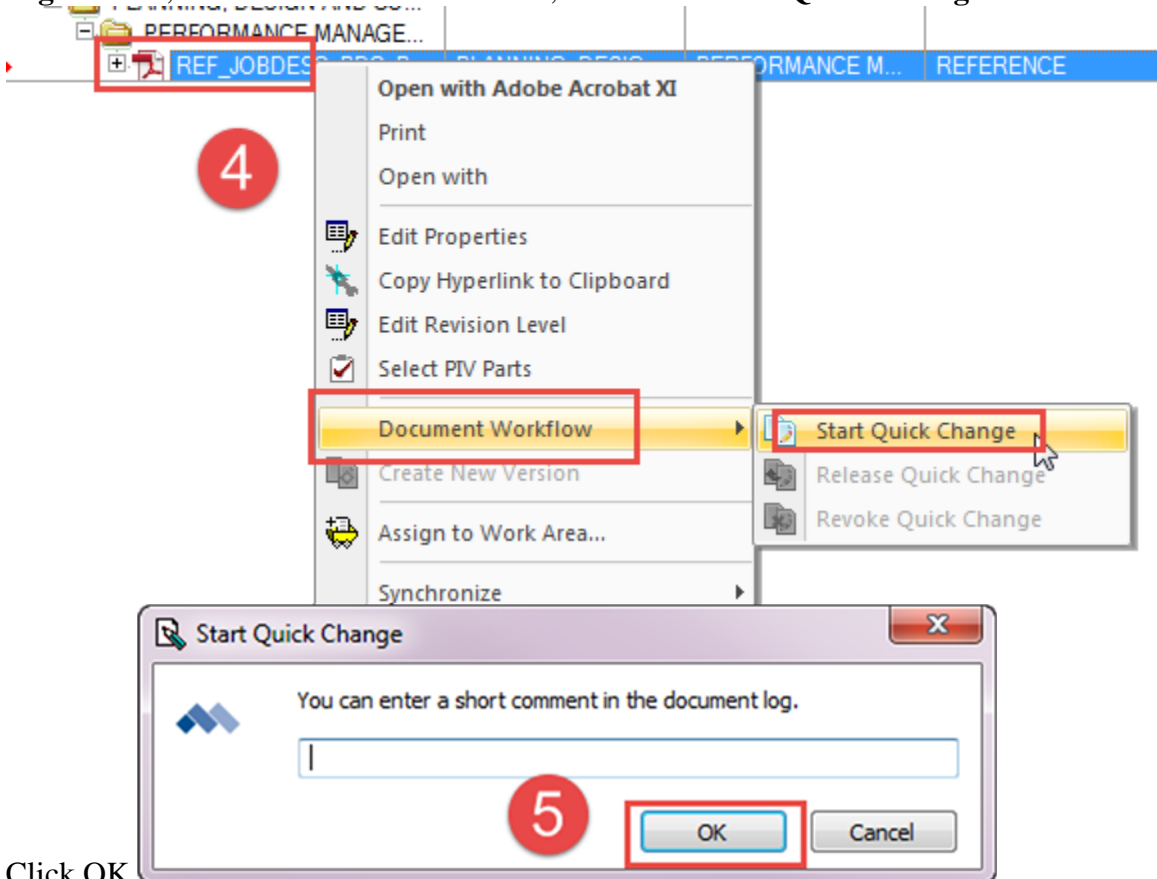


- Find the files using the Nav View: **Job Descriptions**

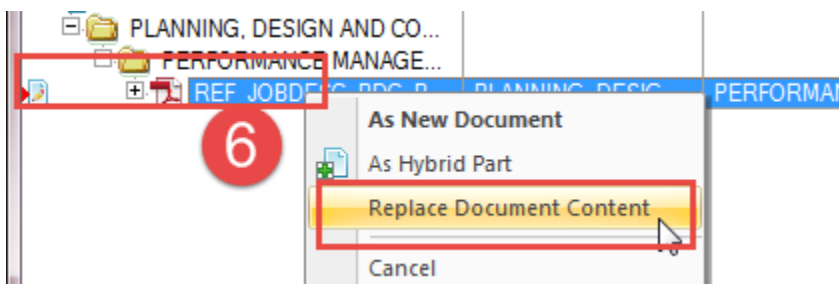


If you are replacing the content of the document completely:

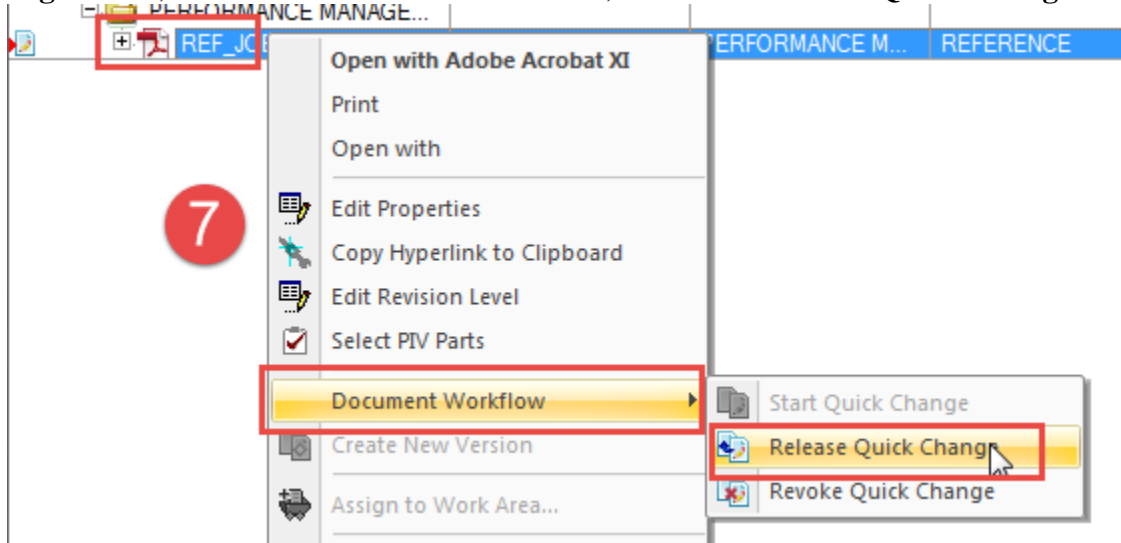
- Right-Click**, select **Document Workflow**, then select **Start Quick Change**



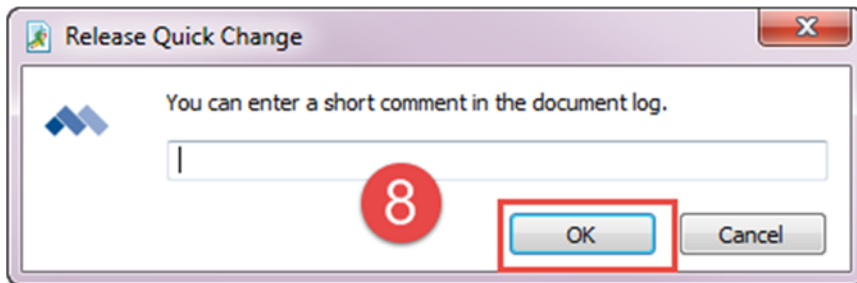
- Click **OK**
- Drag and Drop** the new file directly on top of the file in Meridian, **let go** and select **Replace Document Content**.



7. **Right-click**, then select **Document Workflow**, then select **Release Quick Change**.

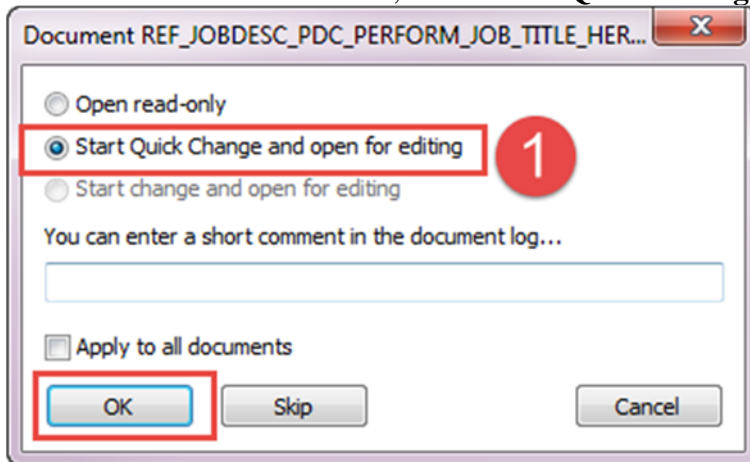


8. Click **OK**

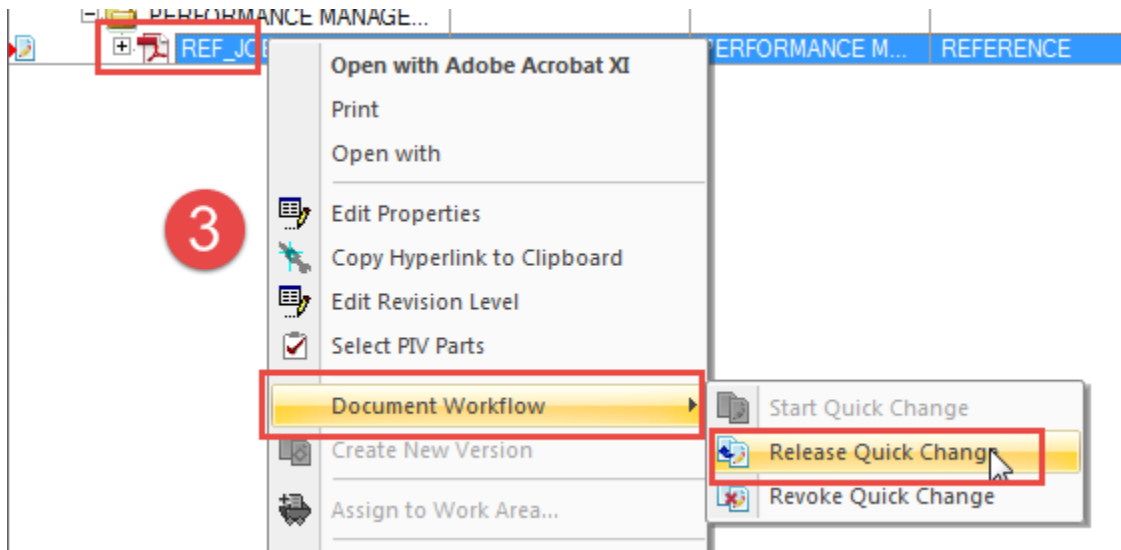


**If you need to update the content of document by typing in it:**

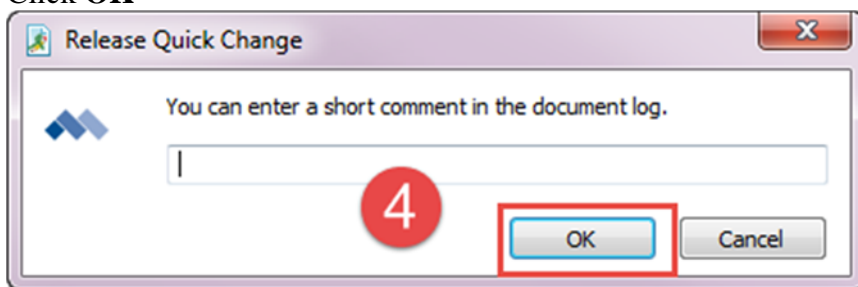
1. Double click on the document, select **Start Quick Change and open for editing**, then click **OK**




2. The document will open, make your changes, click save, then in Meridian:
3. **Right-click**, then select **Document Workflow**, then select **Release Quick Change**.

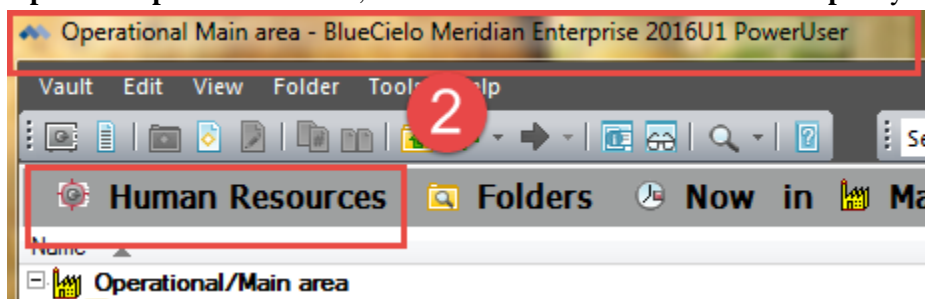


4. Click **OK**



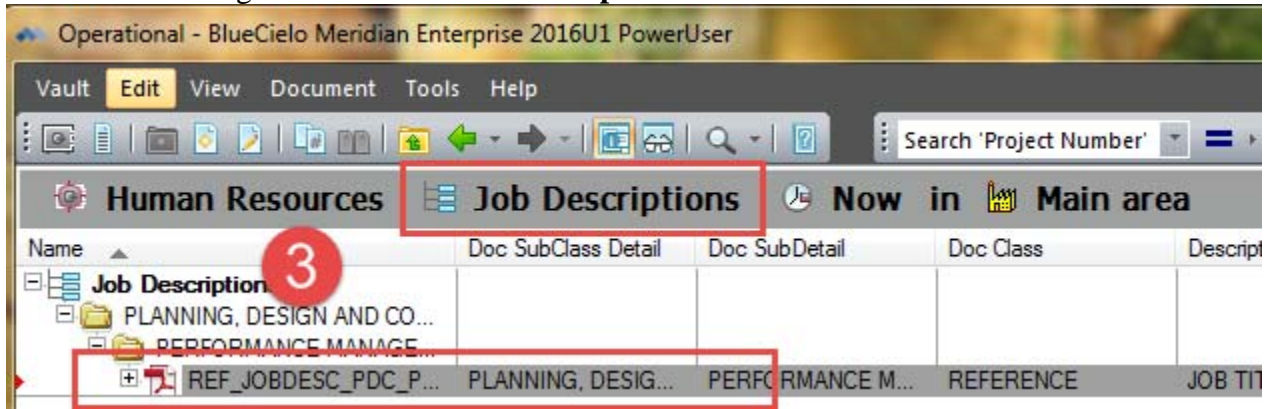
## Procedure for **EDITING PROPERTIES**

1. **Open Meridian**  **1** (Make sure you are using the correct version)
2. **Open the Operational Vault**, then select the **Human Resources Scope** if you aren't there already.

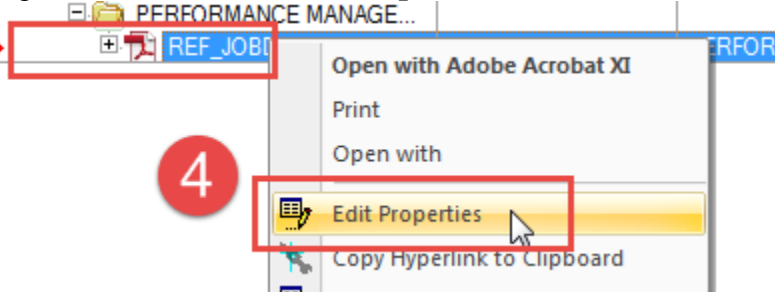




3. Find the files using the Nav View: **Job Descriptions**



4. Right-Click and select **Edit Properties**



5. **Fix** any properties that need to be updated, then click **Finish**.

## Revision History and Owner of Document

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Created: March 2017  
Updated: Month N/A