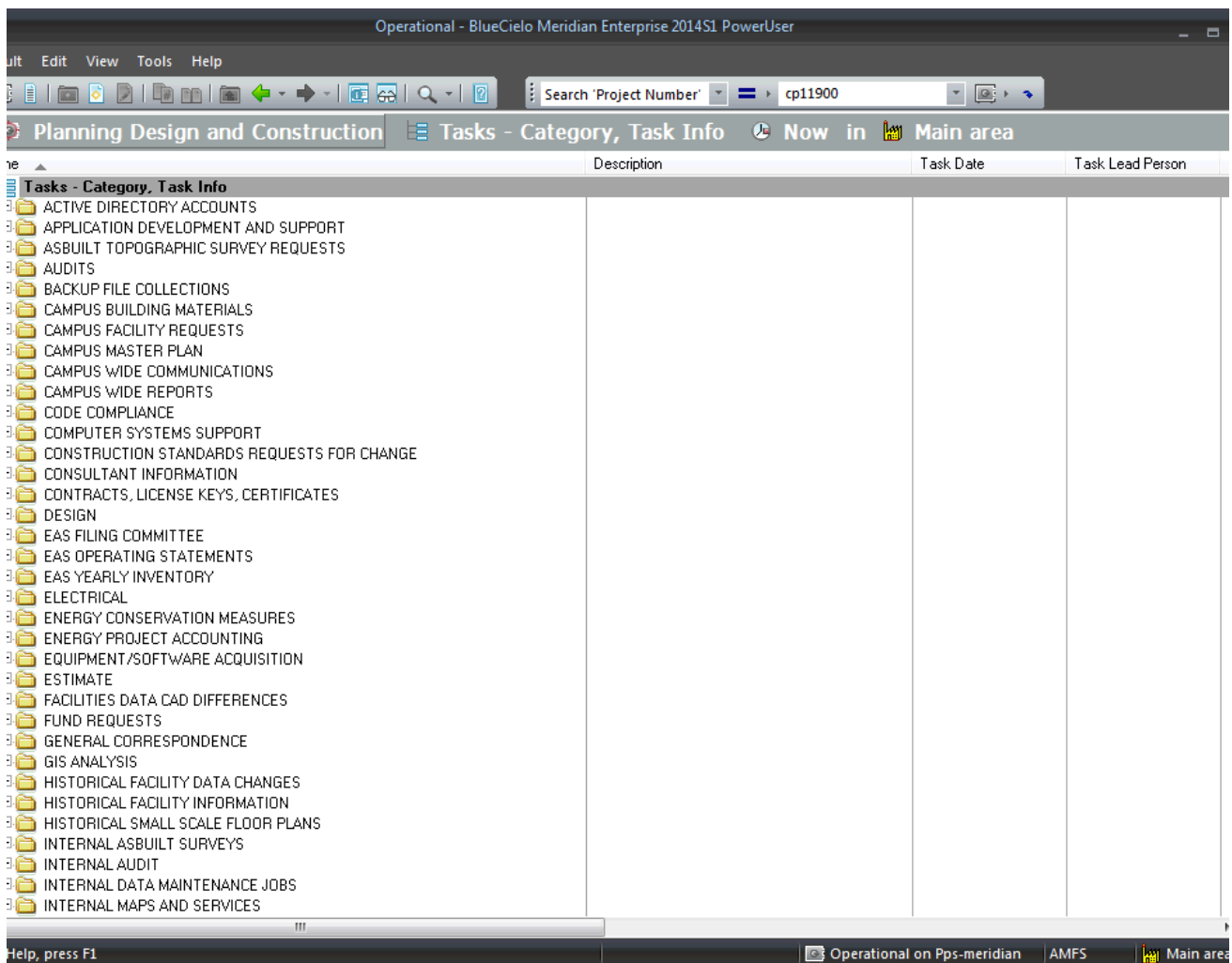


MERIDIAN DOCUMENT MANAGEMENT SYSTEM

Tasks



This manual will give you instructions on what 'Tasks' are and how to use the 'Tasks' document type in Meridian.



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December 11, 2015

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1 Tasks Explanation

1.1 What is it?

Tasks is an area in the Meridian Operational Vault. A Task is an effort that produces documents that are **NOT RELATED** to a construction project. Meridian can be the central repository for the documents and drawings you create for your non-construction project effort (Task).

1.2 Where is it?

Tasks are located in the Operational Vault in Meridian. They are accessible from any scope.

1.3 Why are we using it?

Filing documents in Tasks will keep a historical record of important work not related to construction projects. If everyone files their Tasks in one centralized location, we will be a more organized and productive office.

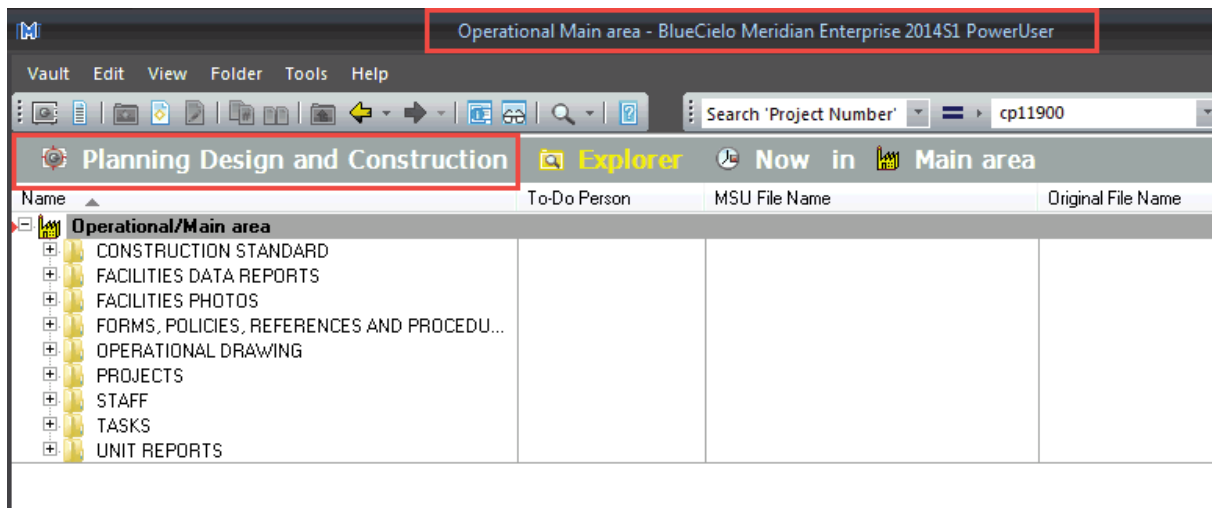
1.4 How to use it


This manual will give you all the information needed to be able to use Tasks efficiently and effectively.

2 General

2.1 Location, Location, Location

Make sure you are working in the **Operational Vault** and in the scope dedicated to your department/crew.



To change scopes, click on the scope icon () and select one from the list. If your specific department or crew is not available, select the best fit or '~all Nav Views'.

3 Tasks

Overview:

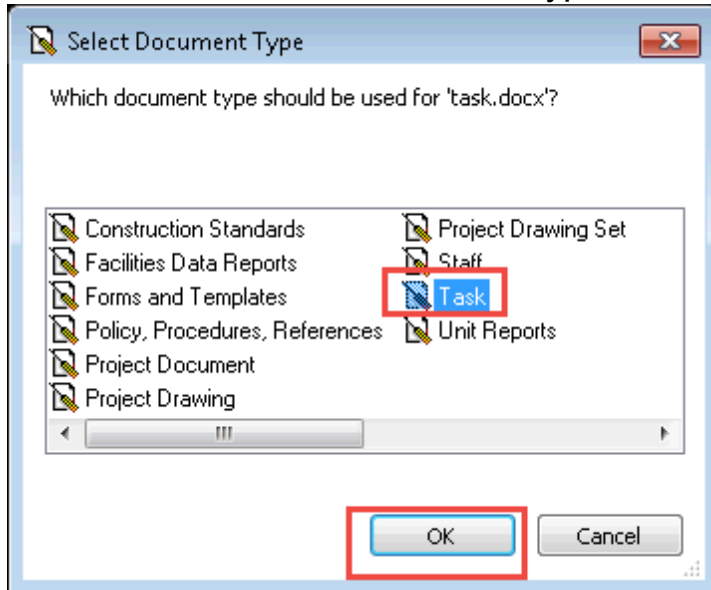
- Tasks are efforts that staff members work on that are NOT RELATED to a Capital Project or Project Request.
- Tasks is NOT intended to be used as a to-do list for a project.
- Each Task describes a unique effort and a task document is a document related to that effort.
- Staff members have the ability to create Tasks as they need them.
- Tasks are organized by Department, Crew, Category.
 - Category is unique to each Crew.
 - Categories provide a way to group similar Tasks.
 - Staff members have the ability to create Categories as they need them

Permissions:

- All IPF staff members can have the permissions to add, edit properties, modify the documents and delete the documents in Tasks. 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.

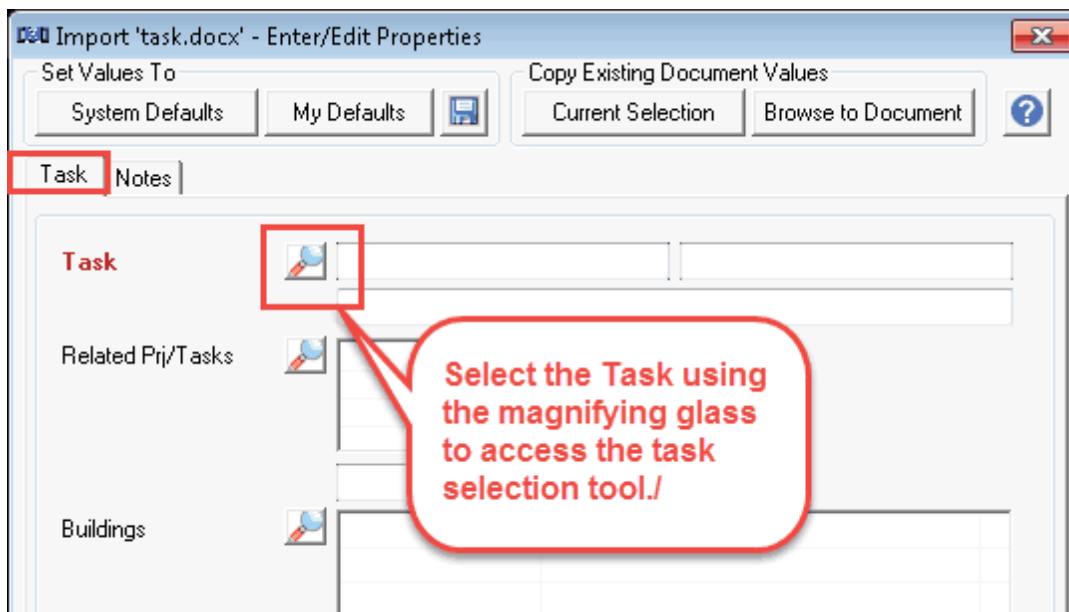
3.1 Adding a Task Document

Add document by Dragging & Dropping it into the Operational Vault in Meridian. Select the document type 'Task' from the dialog box.

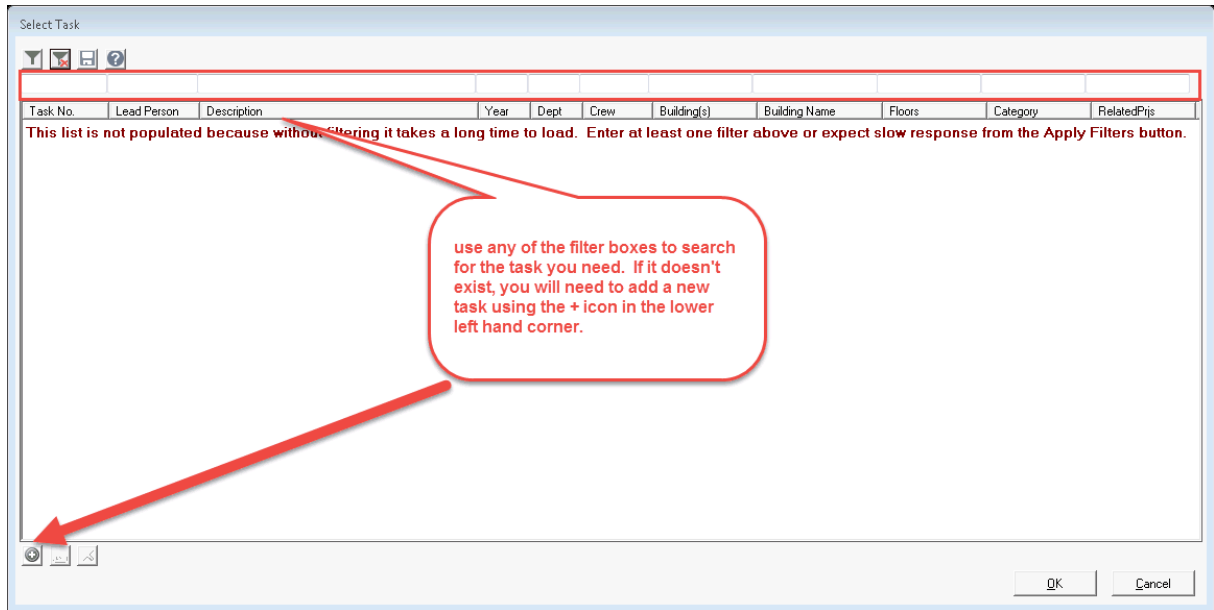


3.1.1 Selecting a Task

The first thing you will need to do is either select an existing Task or create a new Task.

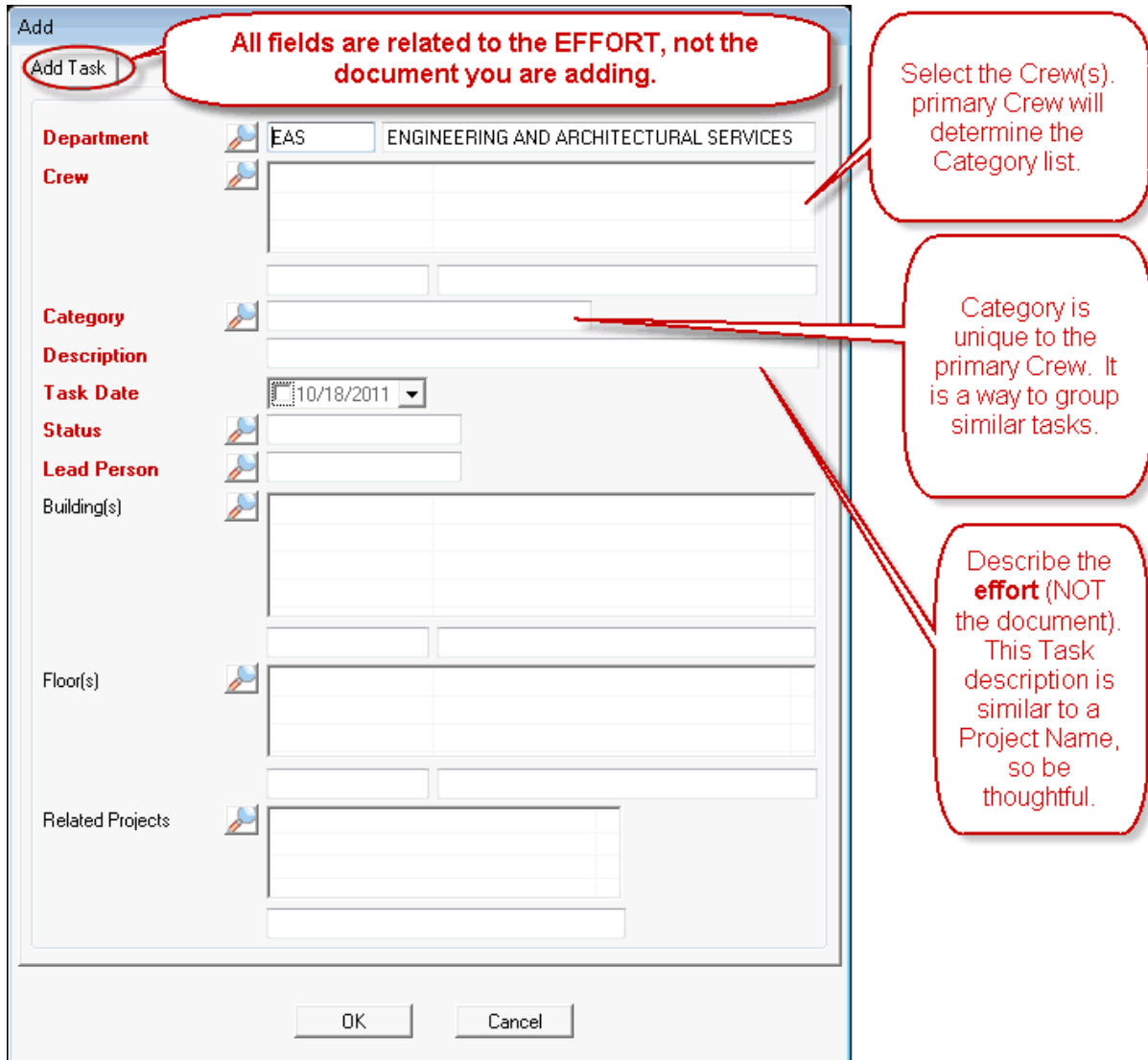


Either select the task you want to add a document to, or create a new Task.



3.1.1.1 Creating a New Task

After you click the 'Create New Task' button , the new Task wizard will come up to fill in.



The screenshot shows the 'Add Task' dialog box with the following fields and callouts:

- Add Task**: A button at the top left, circled in red.
- Department**: A text box containing 'EAS' and 'ENGINEERING AND ARCHITECTURAL SERVICES'.
- Crew**: A multi-row table for selecting crew members.
- Category**: A text box with a callout: "Category is unique to the primary Crew. It is a way to group similar tasks."
- Description**: A large text area with a callout: "Describe the **effort** (NOT the document). This Task description is similar to a Project Name, so be thoughtful."
- Task Date**: A date picker set to '10/18/2011'.
- Status**: A text box.
- Lead Person**: A text box.
- Building(s)**: A multi-row table.
- Floor(s)**: A multi-row table.
- Related Projects**: A multi-row table.
- Buttons**: 'OK' and 'Cancel' buttons at the bottom.

A red callout box at the top states: "All fields are related to the EFFORT, not the document you are adding."

Another red callout box points to the Crew selection area: "Select the Crew(s). primary Crew will determine the Category list."

Category Selection:

Either select the category for your new task from the list, or create a new category for your crew.

The image shows two overlapping dialog boxes from a software application. The top dialog is titled 'Add' and has a tab labeled 'Add Task'. It features a list of fields: Department, Crew, Category, Description, Task Date, Status, and Lead Person. Each field has a small icon to its right. A red circle highlights the 'Category' icon. A second dialog box, titled 'Select Category', is overlaid on top of the first. It has a 'Category' text input field and 'OK' and 'Cancel' buttons. A red callout bubble points to the 'OK' button with the text 'Select to create a new Category'. Below the 'Add Task' dialog is another dialog titled 'Add' with a tab labeled 'Add Task Category'. It has input fields for 'Department' (containing 'EAS'), 'Crew', and 'Category'. A red circle highlights the 'Crew' field, with a callout bubble saying 'Type in 'Crew Code' (from crew list in wizard)'. Another red circle highlights the 'Category' field, with a callout bubble saying 'Type in Category description.'. At the bottom of this dialog are 'OK' and 'Cancel' buttons. A label 'Region, Window, and Scrolling Window inputs' is positioned above the bottom 'OK' and 'Cancel' buttons.

3.1.2 Document Description

Now that you have selected the Task, Finish filling in the wizard by describing the document properties.

Import 'task.docx' - Enter/Edit Properties

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

Task | Notes

Task T-2014-00021 5/1/2014
FISCAL YEAR 2014-2015

Related Proj/Tasks

Buildings

Floor(s)

Description funding matrix

File Suffix FUNDING MATRIX

Security Level PB PUBLIC

Document Date 12/11/2015

Orig. FileName task

File Name:

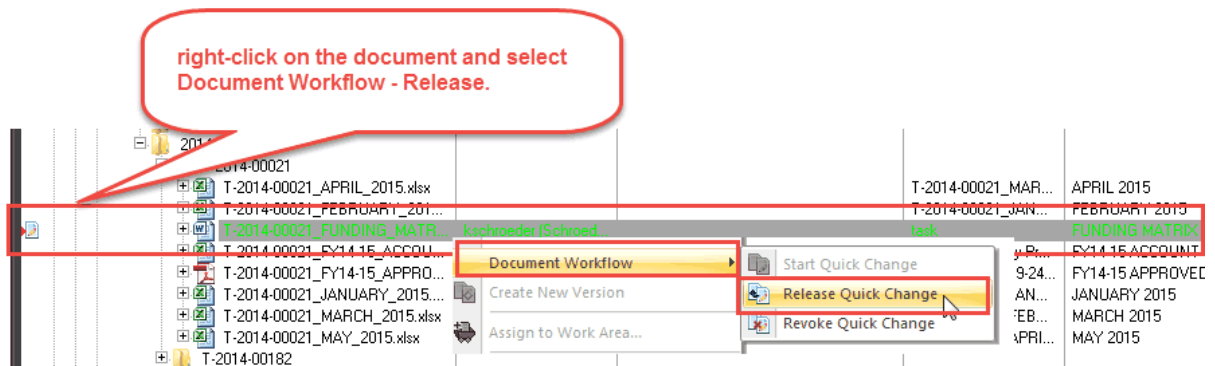
Delete Source View

Finish Cancel

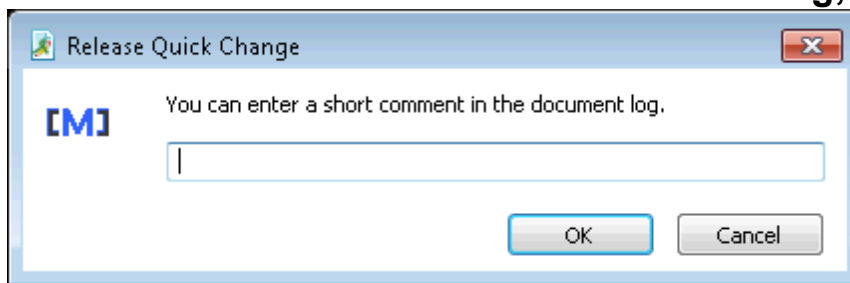
fill in the description. The file suffix will be automatically filled in. Then click Finish.

3.1.3 Release the Document

Remember to Release the Document when you are finished working on it.



You can enter a comment for the revision log, then click OK.



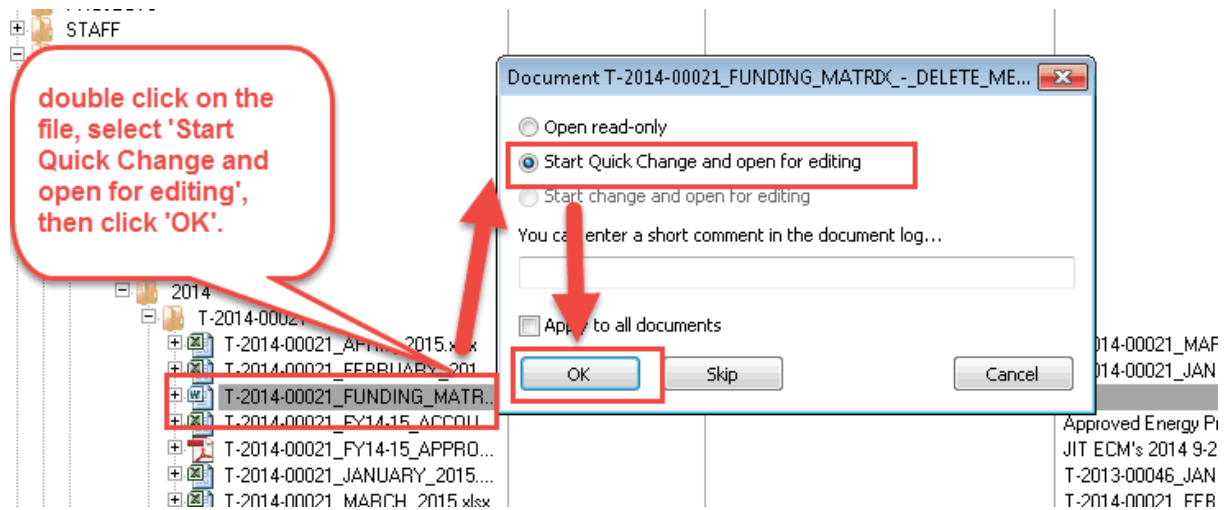
3.2 Modifying the Document

Users can modify a document already stored in meridian by either 'starting a quick change and opening for editing' or by 'replacing the document content'.

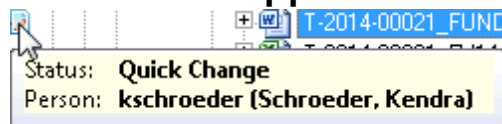
3.2.1 Quick Change and open for Editing

Start a quick change:

Find the document that needs to be updated and double-click on it.

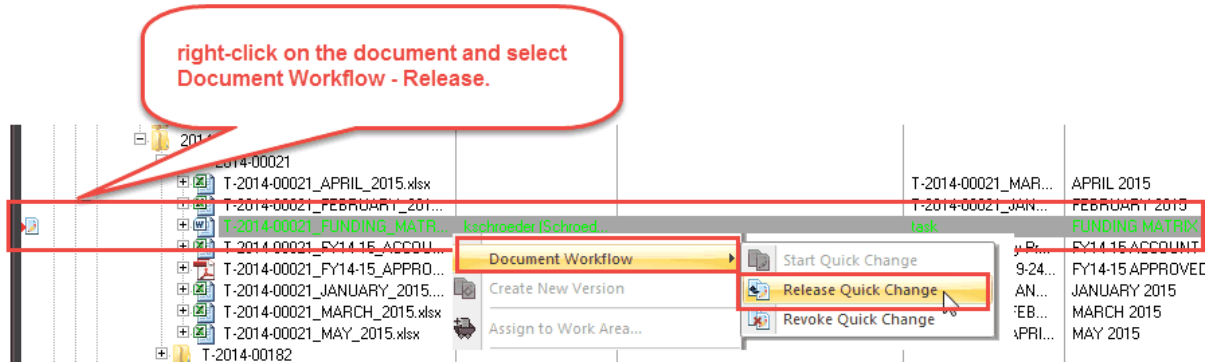


The document will then be under a quick change status and open in the native application for editing.

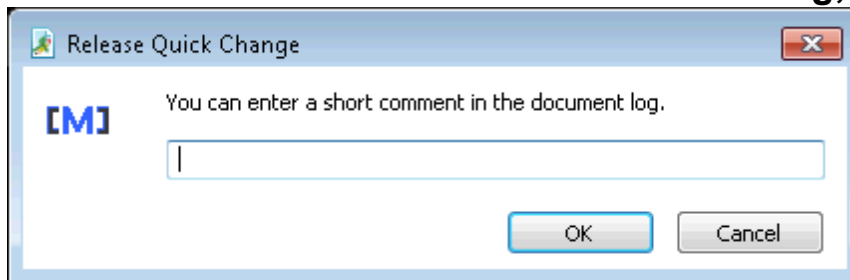


Once you make your changes, save the document and close it.

Then you will need to release the quick change in meridian to store the new version.



You can enter a comment for the revision log, then click OK.

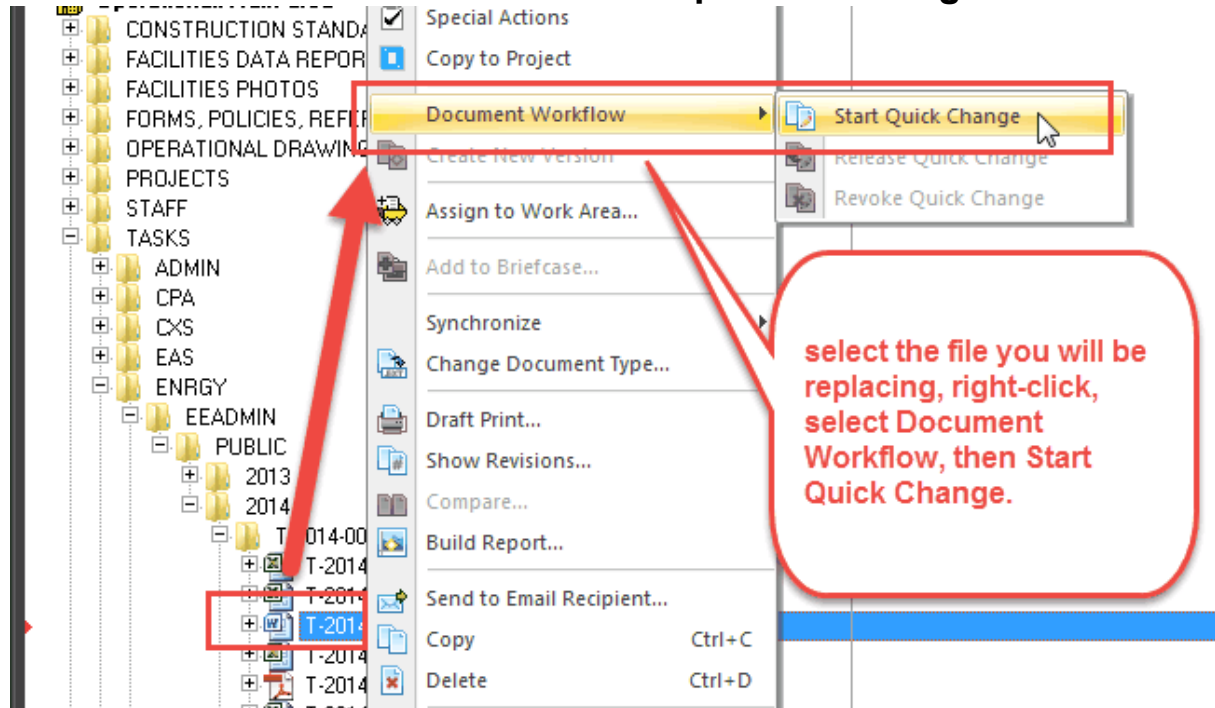


3.2.2 Replace the Document Content

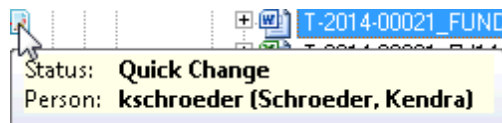
Replace Document Content:

Use this option to make changes to a document outside of Meridian, then replace the current document in the system with the new version.

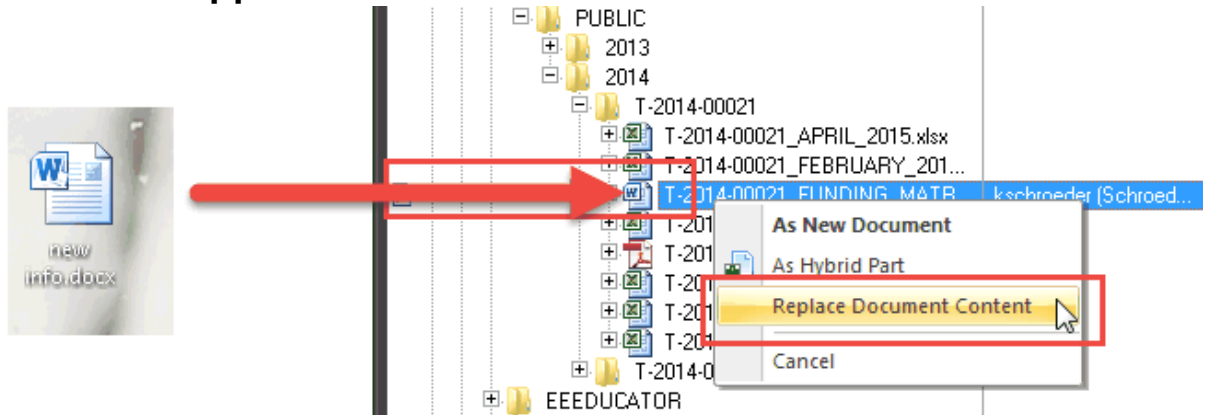
Find the document that needs to be updated and right-click on it.



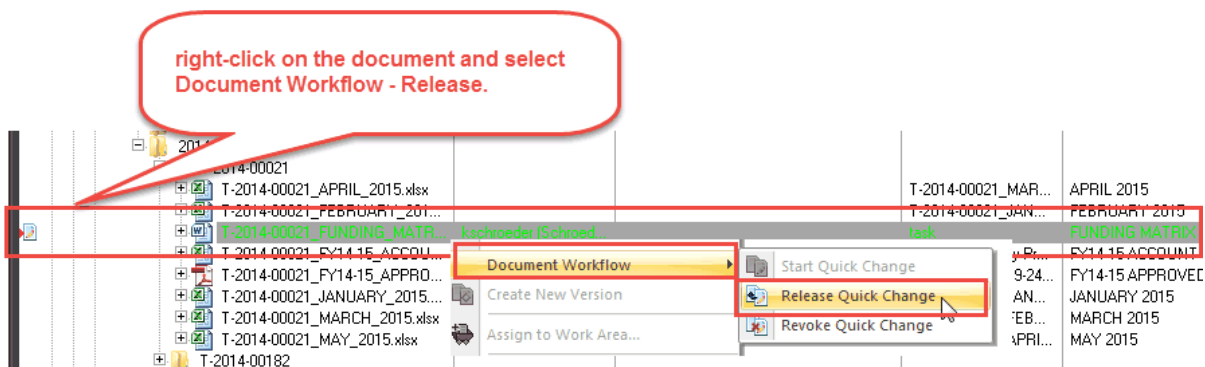
The document will then be under a quick change status.



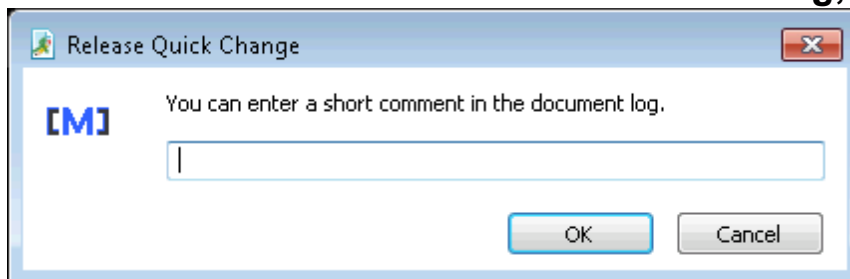
Drag and Drop the new file from outside Meridian DIRECTLY ON TOP of the file you will be replacing in Meridian and release the mouse button. Then select 'Replace Document Content' from the menu that appears.



It will seem as if nothing happens after this, but it will be replaced. Once this is done, you will need to release the quick change in meridian to store the new version.

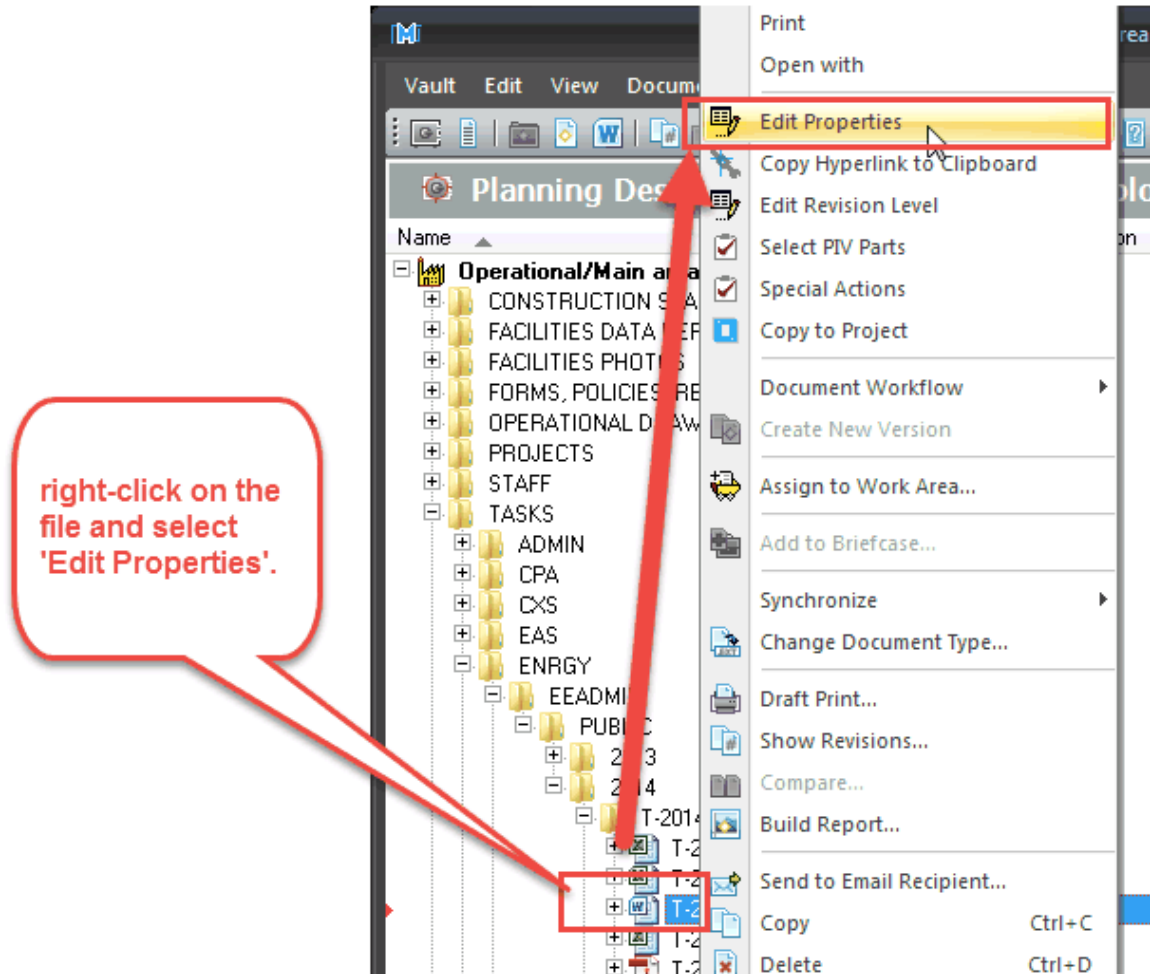


You can enter a comment for the revision log, then click OK.



3.3 Editing Document Content

To change the metadata associated to the task document, right click on the file and select 'Edit Document properties'. Make any necessary changes to the metadata fields, then click Finish.



Create 'T-2014-00021_FUNDING_MATRDX_-_DELETE_ME.docx' - Enter/Edit Properties

Task | Notes

Task

Related Proj/Tasks

Buildings

Floor(s)

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.

Finish

Description
File Suffix
Security Level

Document Date
Orig. FileName

File Name:

Store as My Defaults