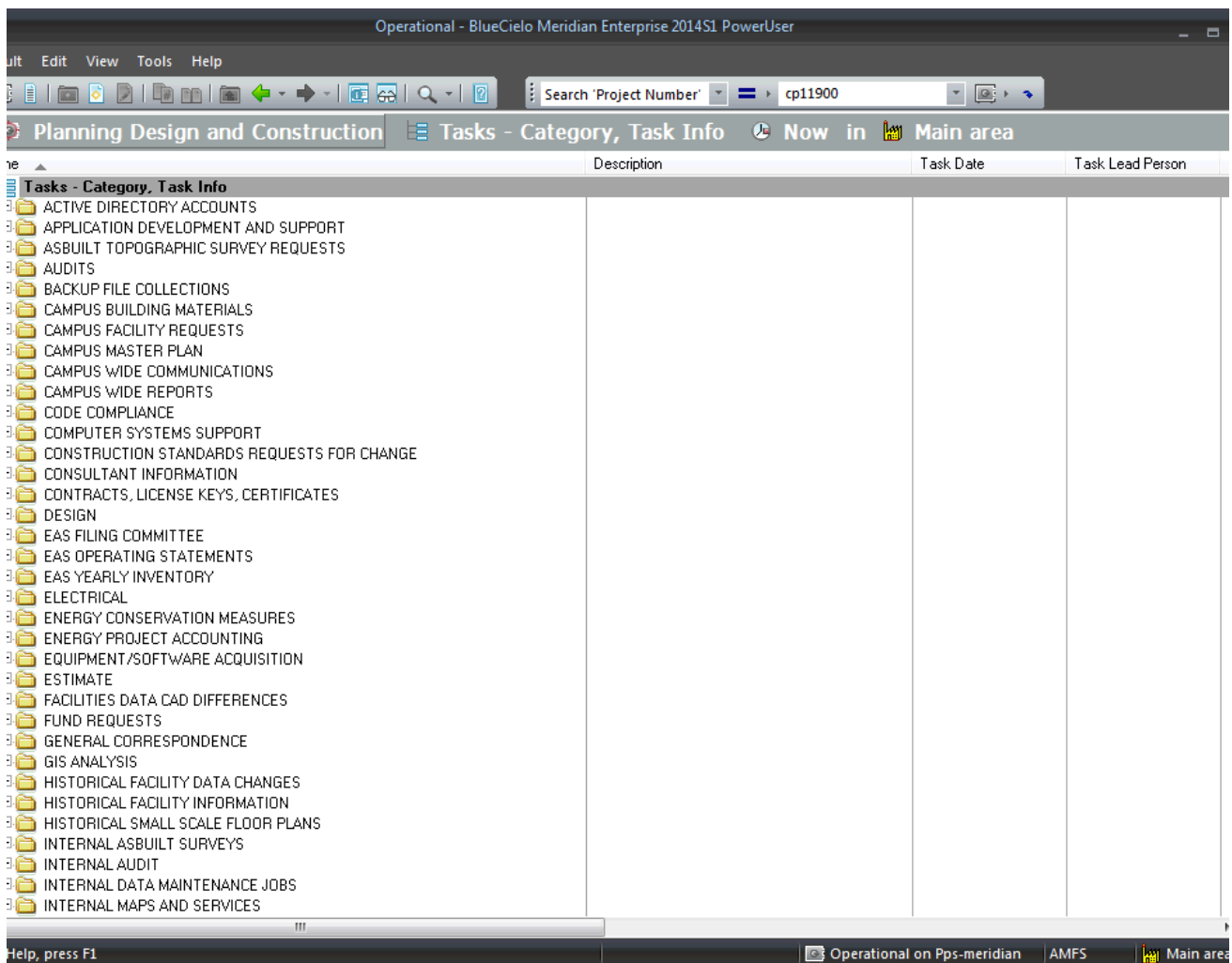# MERIDIAN DOCUMENT MANAGEMENT SYSTEM

Tasks

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

MICHIGAN STATE UNIVERSITY

December 11, 2015

Table of Contents

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.
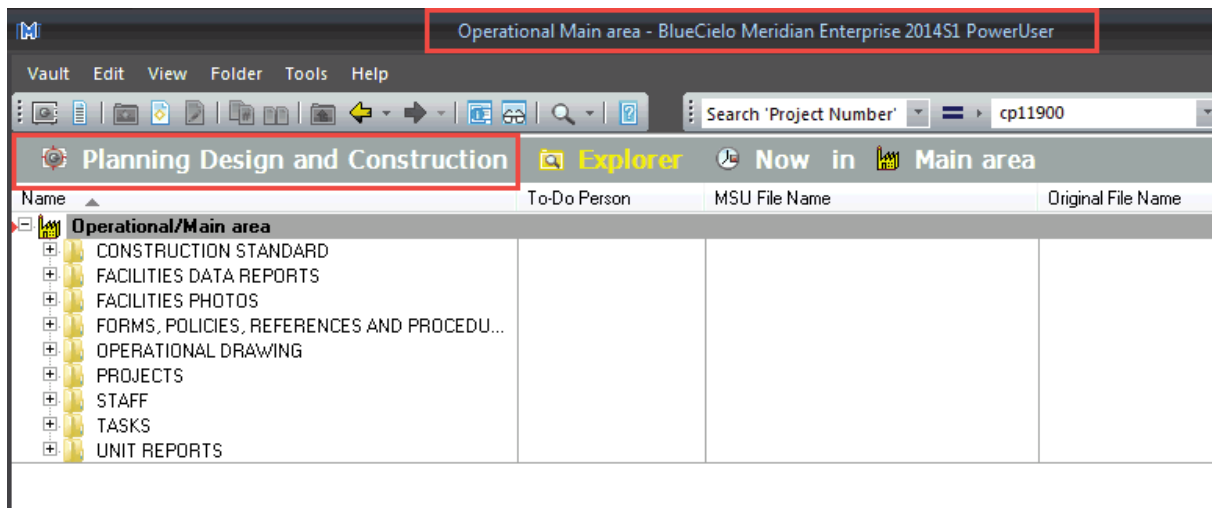
1.4 How to use it

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.
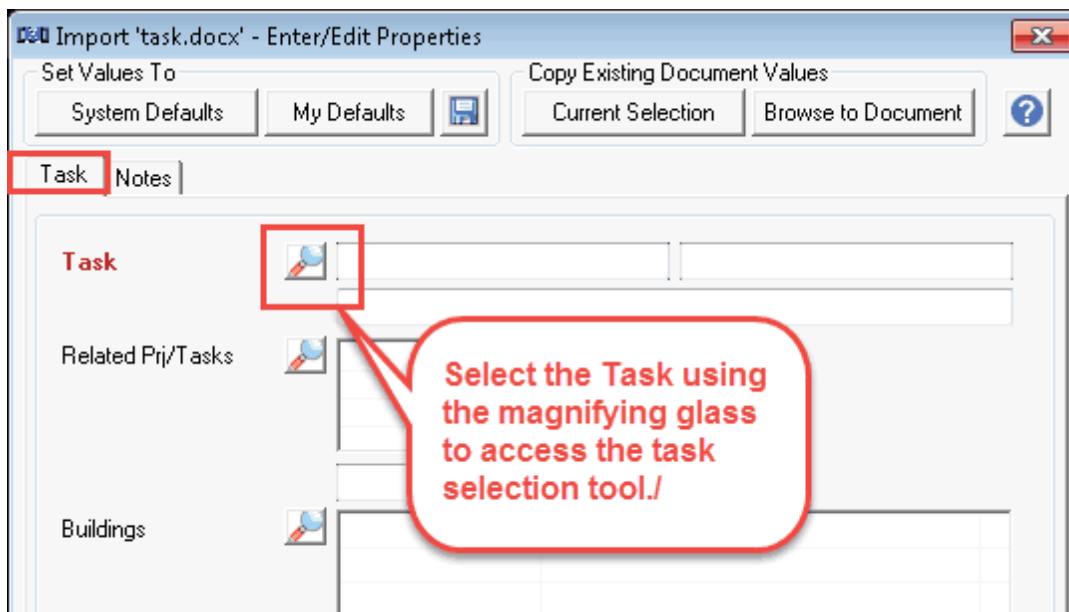
3.1   Adding a Task Document

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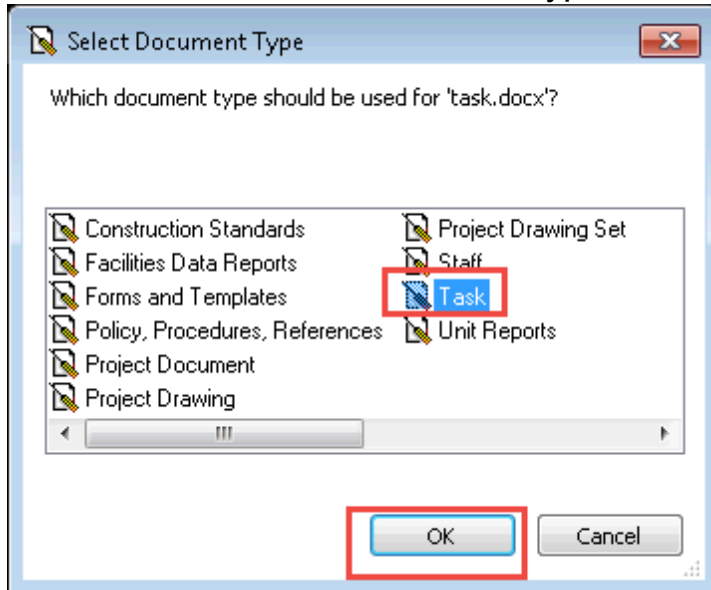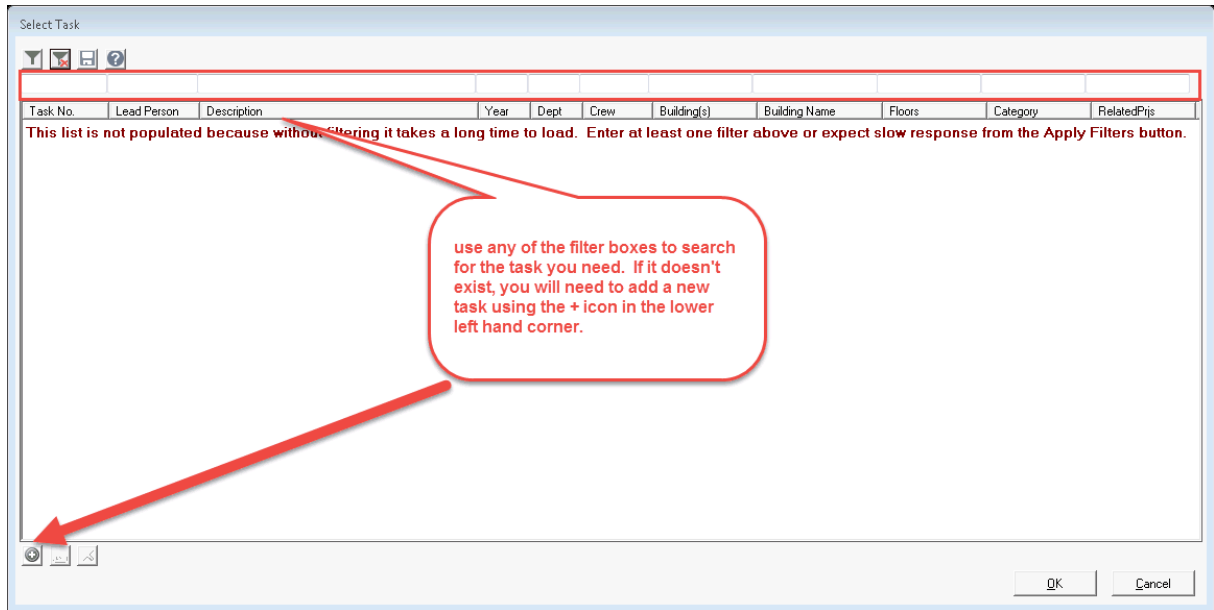

3.1.1   Selecting a Task

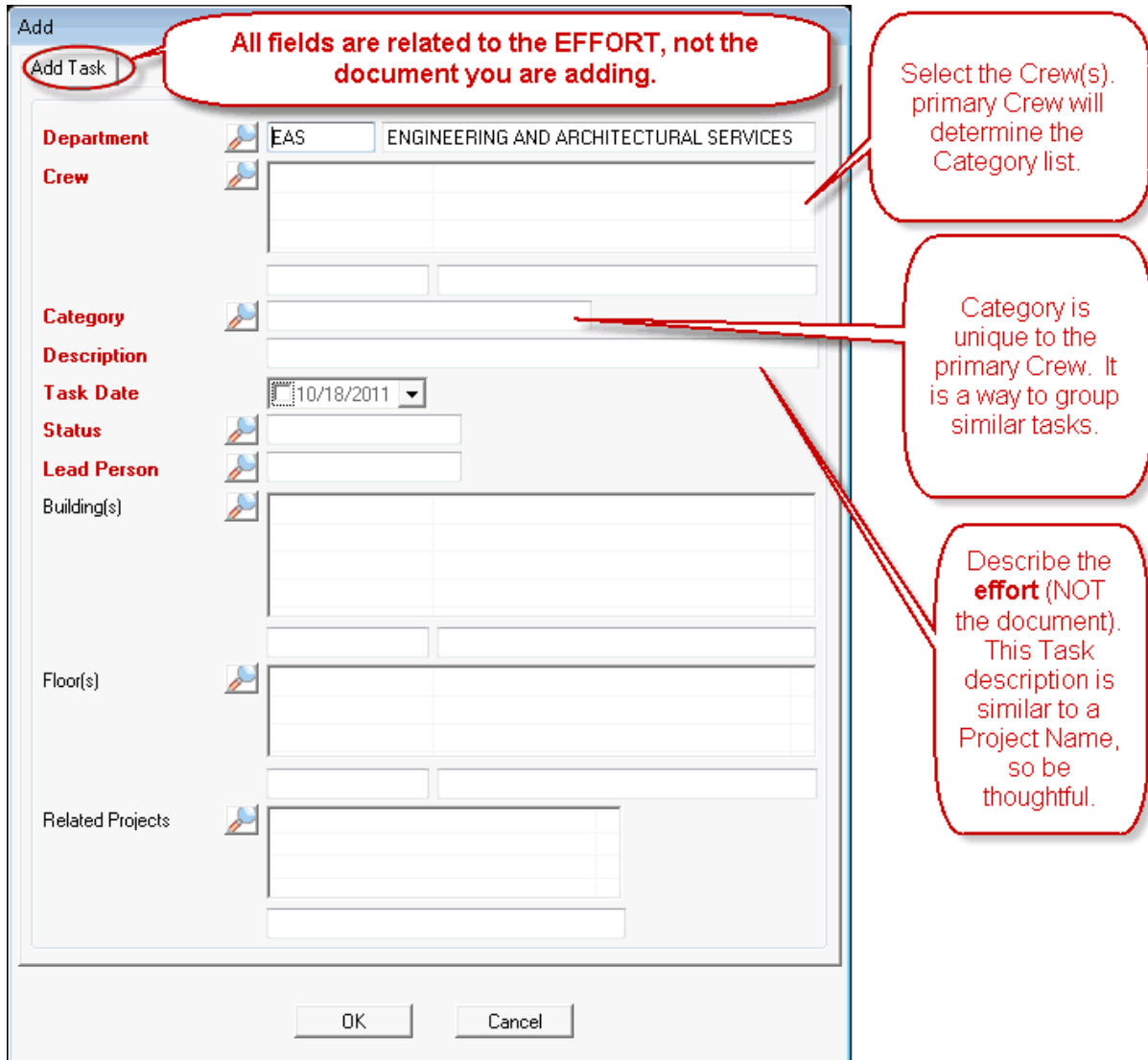**The first thing you will need to do is either select an existing Task or create a new Task.**

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.

Category Selection:

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

3.1.2 Document Description

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

3.1.3   Release the Document

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

right-click on the document and select
Document Workflow - Release.
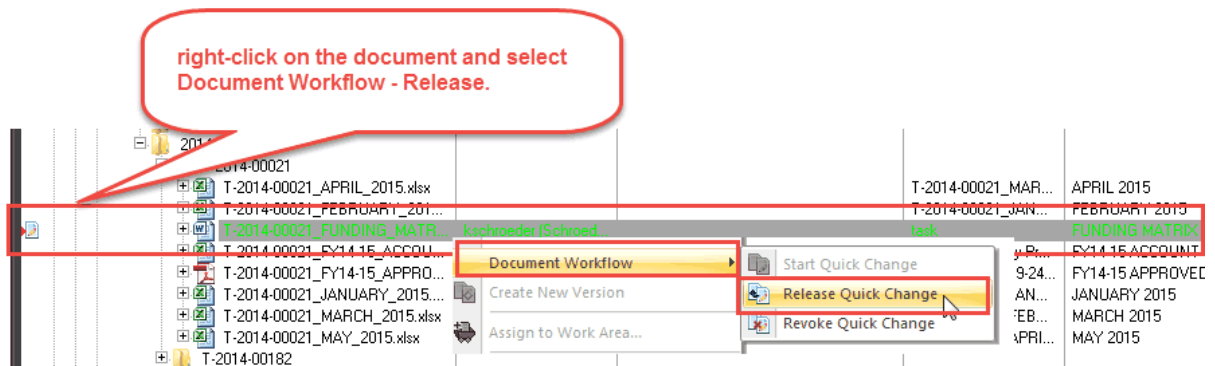
You can enter a comment for the revision log, then click OK.
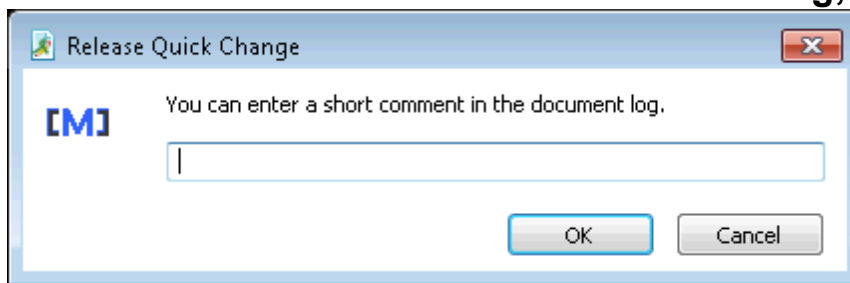
3.2 Modifying the Document

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'.

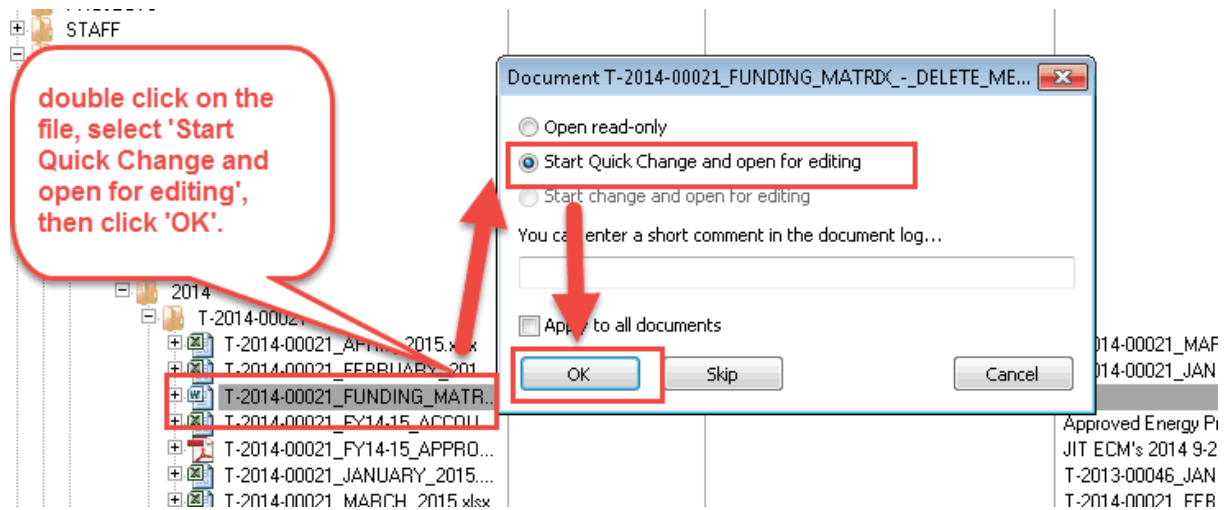### 3.2.1 Quick Change and open for Editing

<u>**Start a quick change:**</u>
Find the document that needs to be updated and double-click on it.

double click on the file, select 'Start Quick Change and open for editing', then click 'OK'.

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

Status: **Quick Change**
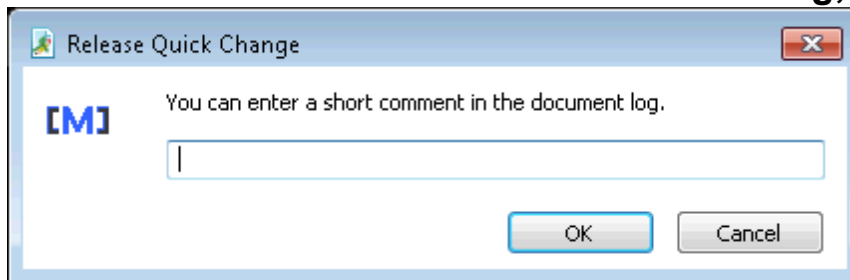Person: **kschroeder (Schroeder, Kendra)**
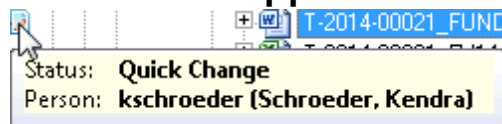
Once you make your changes, save the document and close it.

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

right-click on the document and select
Document Workflow - Release.
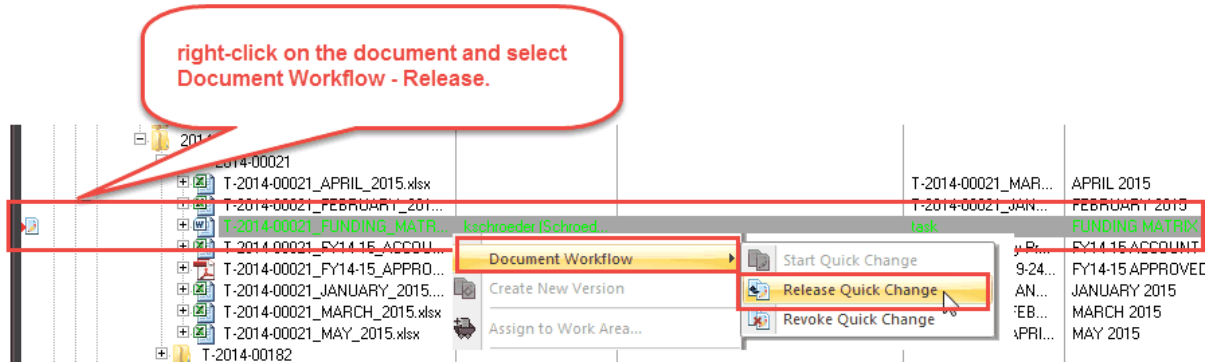
You can enter a comment for the revision log, then click OK.

3.2.2 Replace the Document Content

<u>Replace Document Content:</u>
Use this option to make changes to a document outisde 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.

select the file you will be replacing, right-click, select Document Workflow, then Start Quick Change.

The document will then be under a quick change status.

Status: **Quick Change**
Person: **kschroeder (Schroeder, Kendra)**

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.

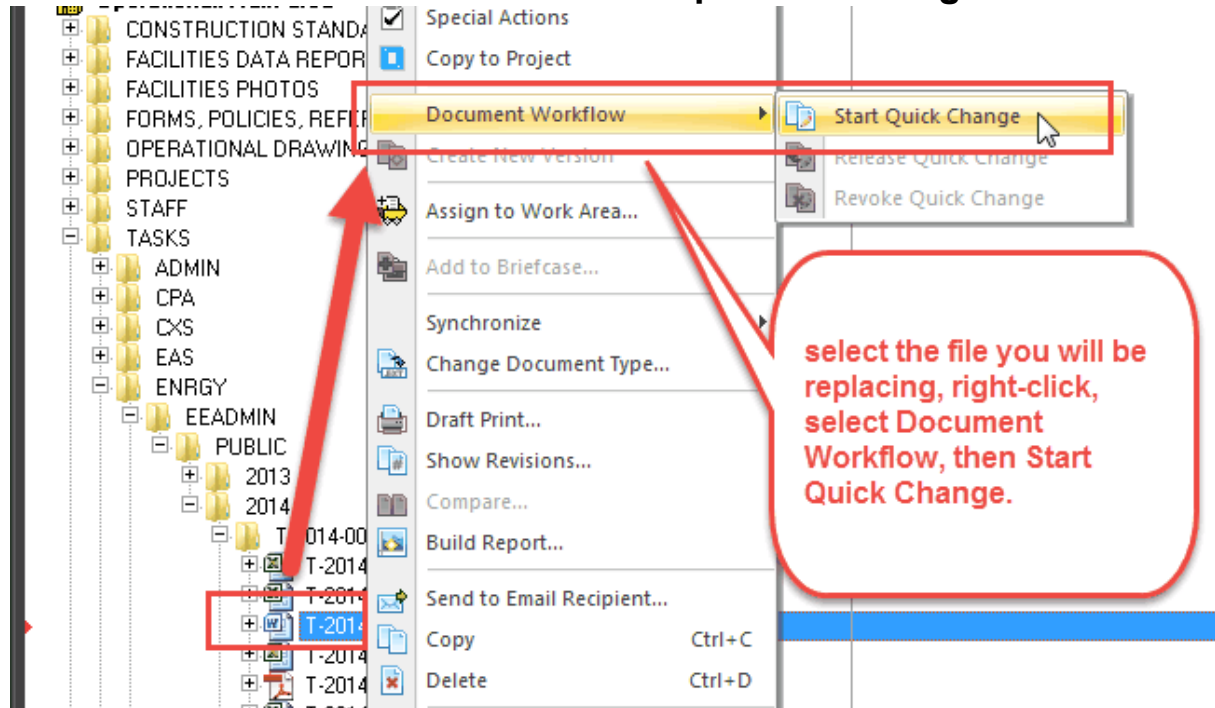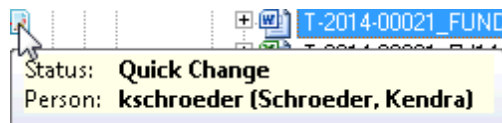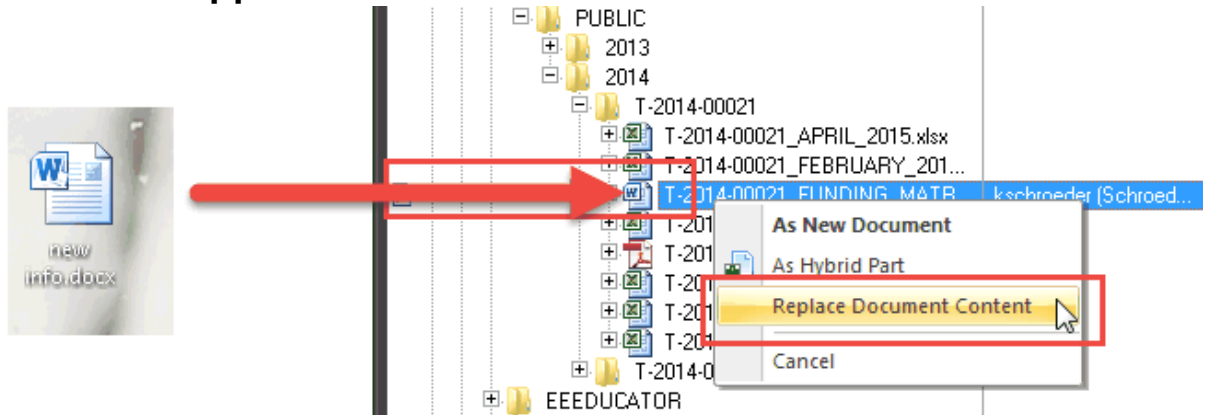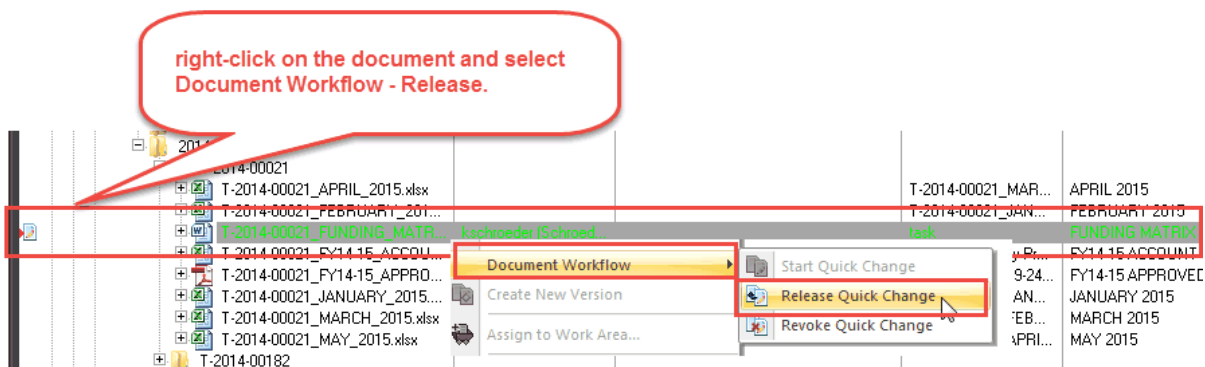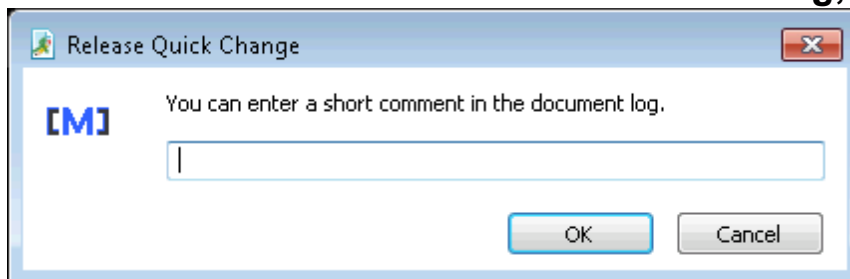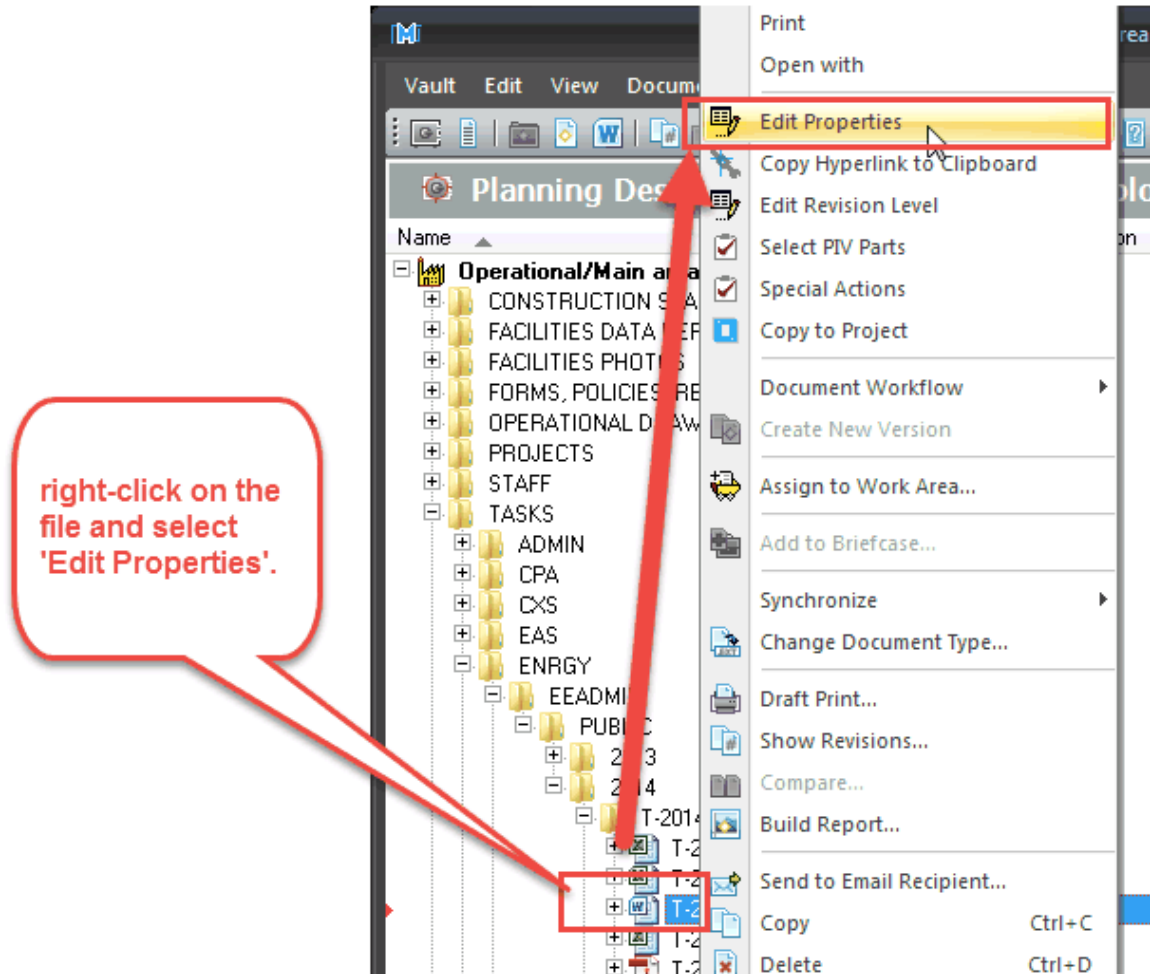**You can enter a comment for the revision log, then click OK.**

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.

right-click on the file and select 'Edit Properties'.