Infrastructure Planning and Facilities
MICHIGAN STATE UNIVERSITY

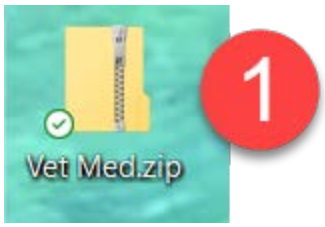
Meridian Active Project Documents- CXS Adding files

Purpose

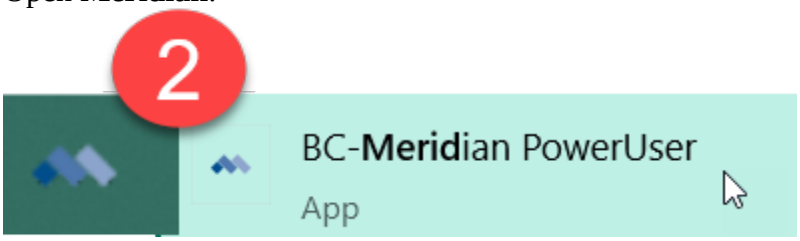
Instructions for CXS to add their S drive EBCX files into Meridian Active Projects.

Procedure

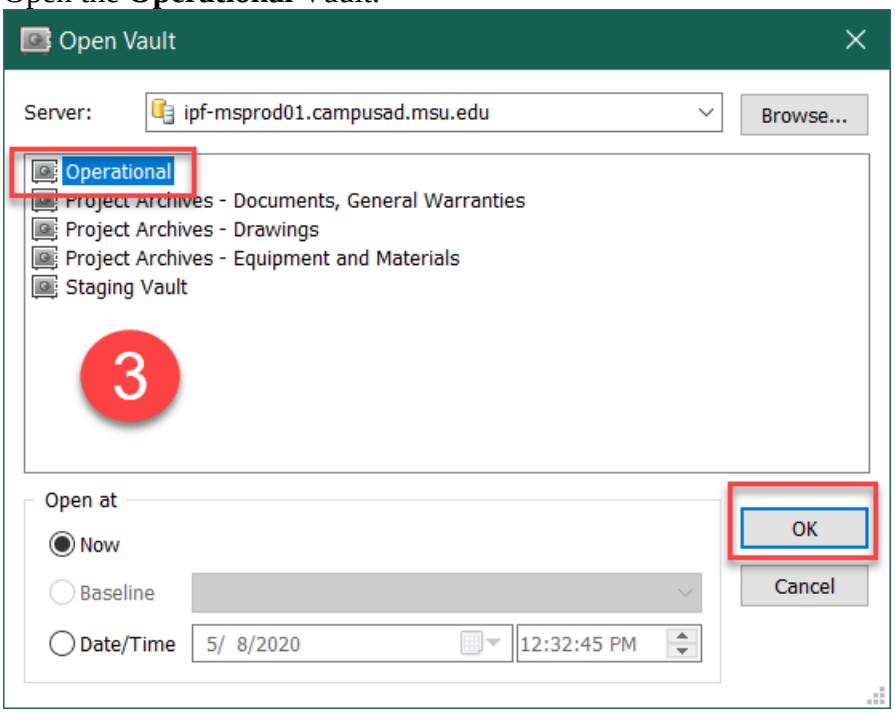
1. Create a zip file that contains the CXS files you want to add to Meridian.
    a. One zip file per building would be fine unless the zip files get too big, then they need to be split up in a thoughtful manner. 4GB is the biggest file size accepted by Meridian.
    b. Name the file with the name of the building.



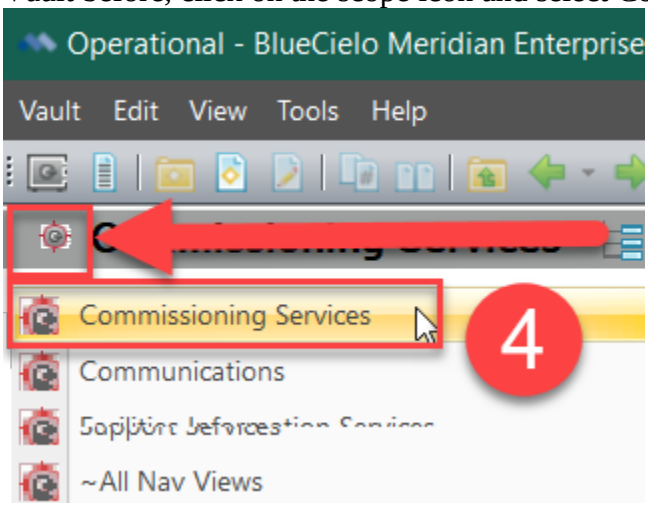
2. Open **Meridian**.

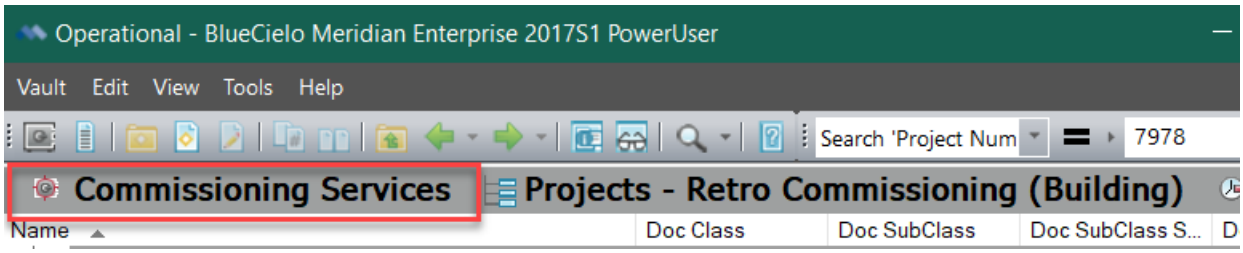


3. Open the **Operational** Vault.

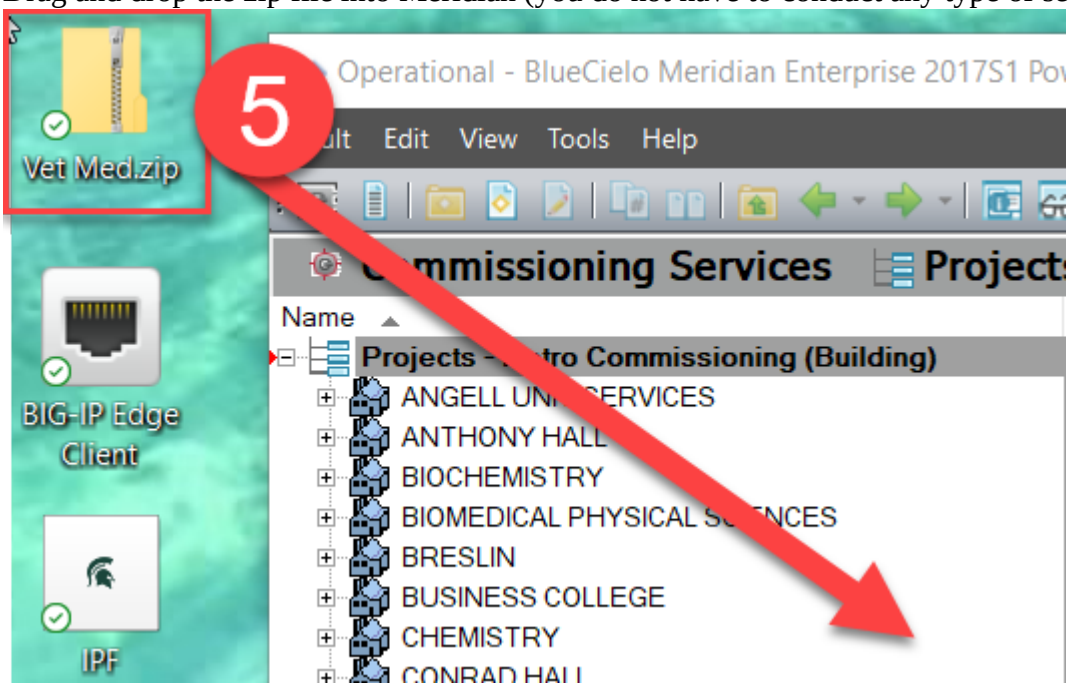


4. If it is your first time opening the Operational Vault, select the **Commissioning Services** Scope.
    a. If you aren't in the commissioning services scope, but have already been in the Operational Vault before, click on the scope icon and select Commissioning Services.

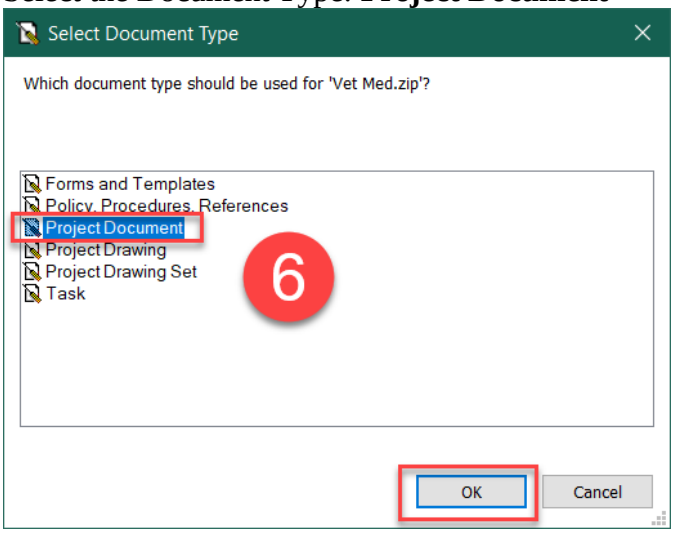




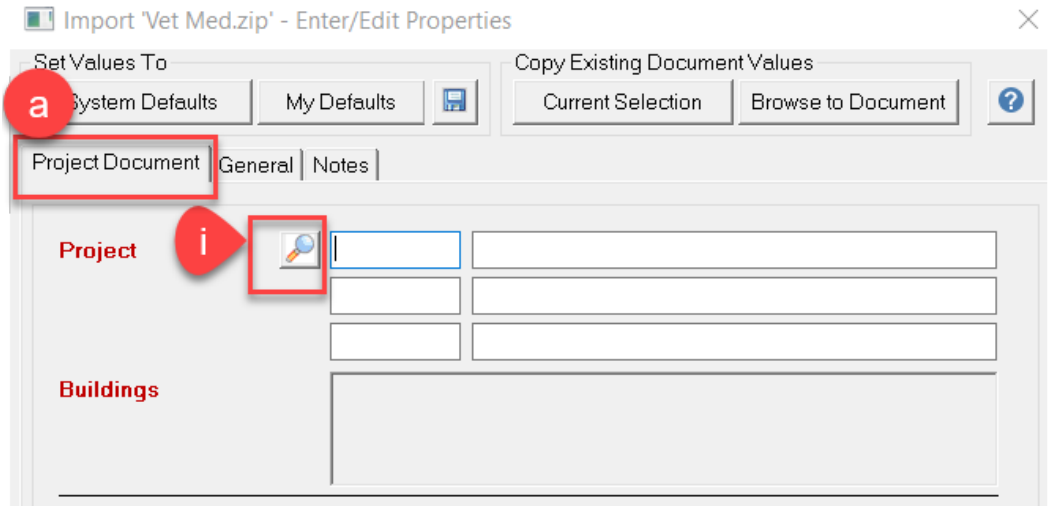
5. Drag and drop the zip file into Meridian (you do not have to conduct any type of search first).



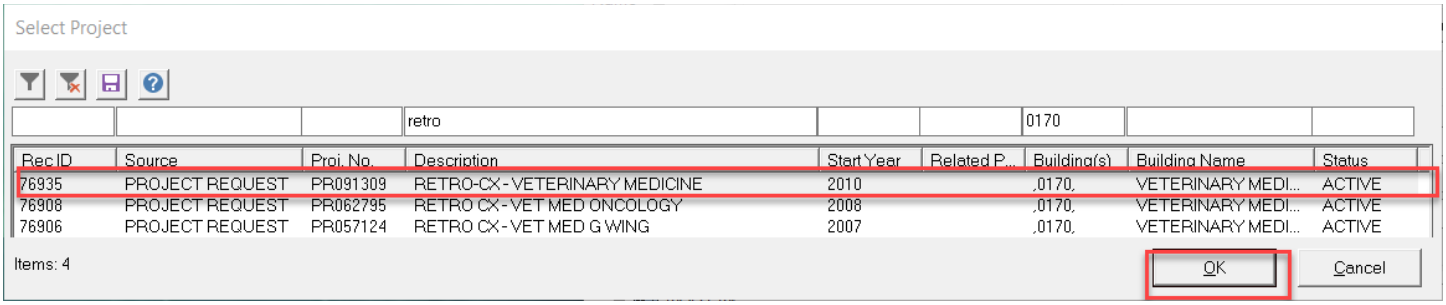
6. Select the Document Type: **Project Document**



7. Describe the file. Red fields are required. (after doing this once, see helpful hints below for a faster way)
    a. **Project Document** Tab
        i. Click on the **magnifying glass** and select the project from the project administration tool.

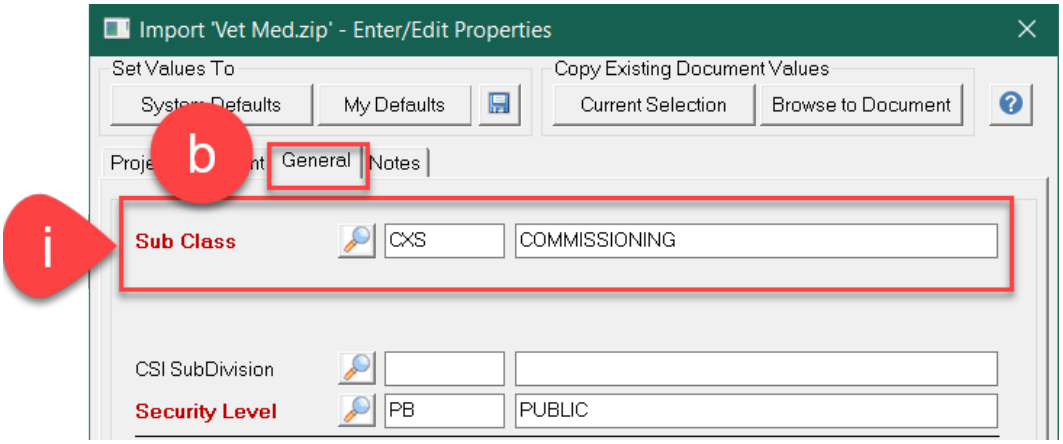


- Use the **filter fields** to find the project.
- **Double click on the project or select it and click OK.** If you don't do this, you will have to repeat the step.

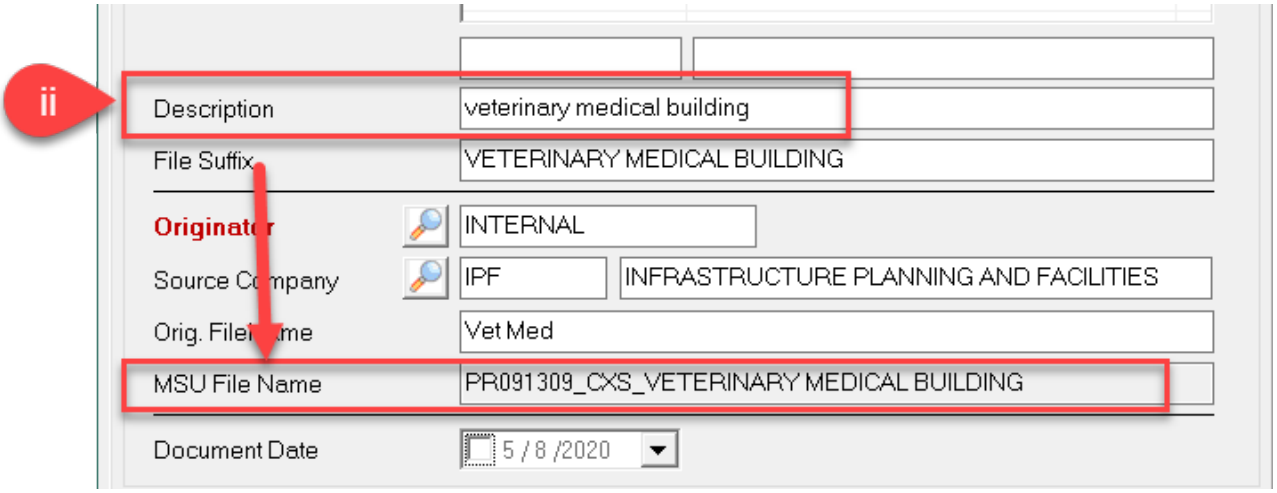


b. **General** Tab

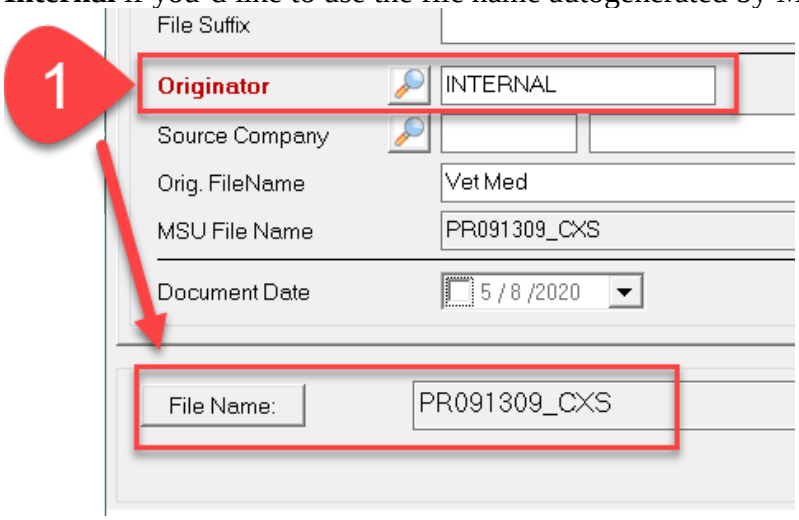
i. Fill in the **Sub Class**: Commissioning



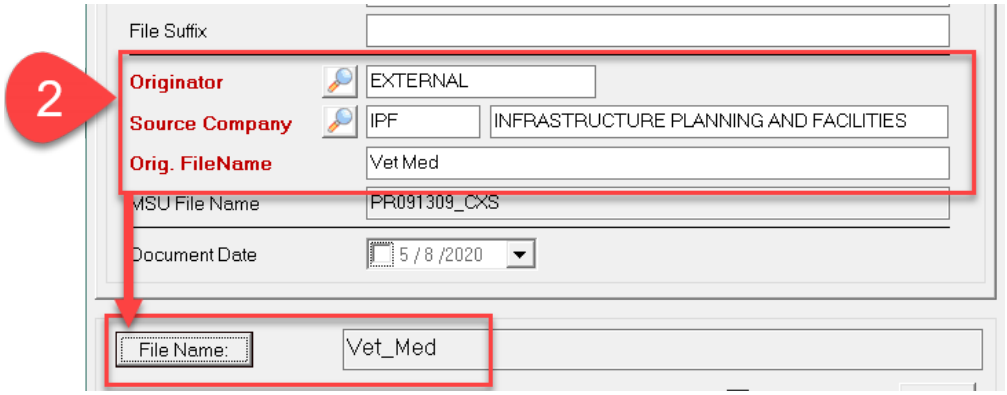
1. **Description** is optional and will become part of the Meridian generated file name if filled in.



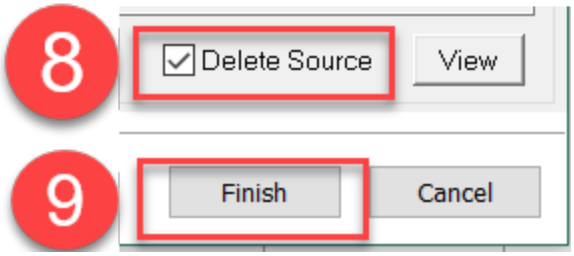
2. Pick an **Originator**:
    1. **Internal** if you'd like to use the file name autogenerated by Meridian.



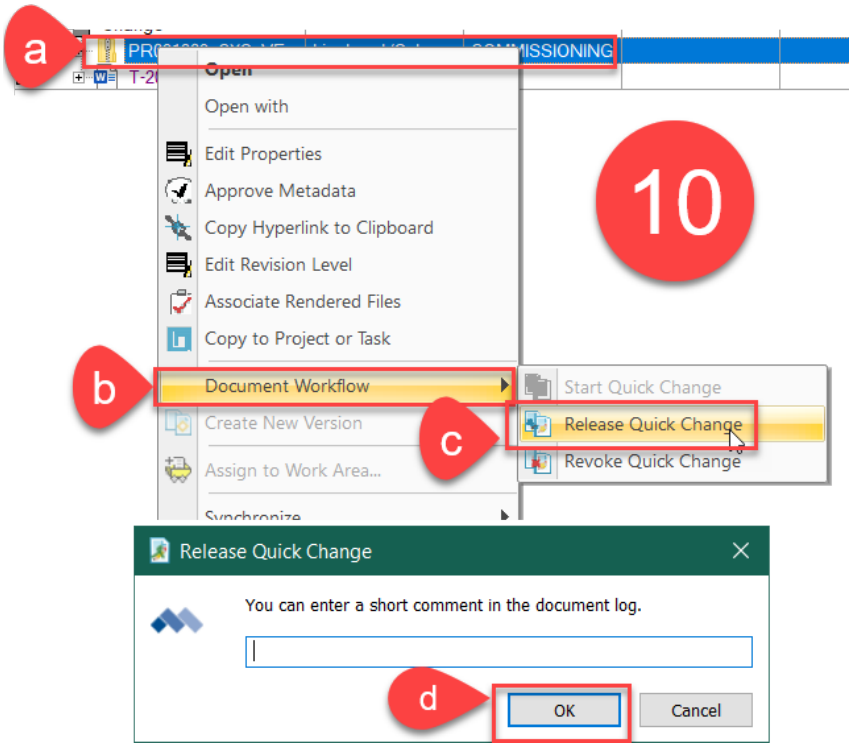
    2. **External** if you want Meridian to use the original file name. If you select this option, you will have to pick a source company (IPF).



8. Check the box for **Delete Source**. This will delete the file from the network drive.
9. Click **Finish**.

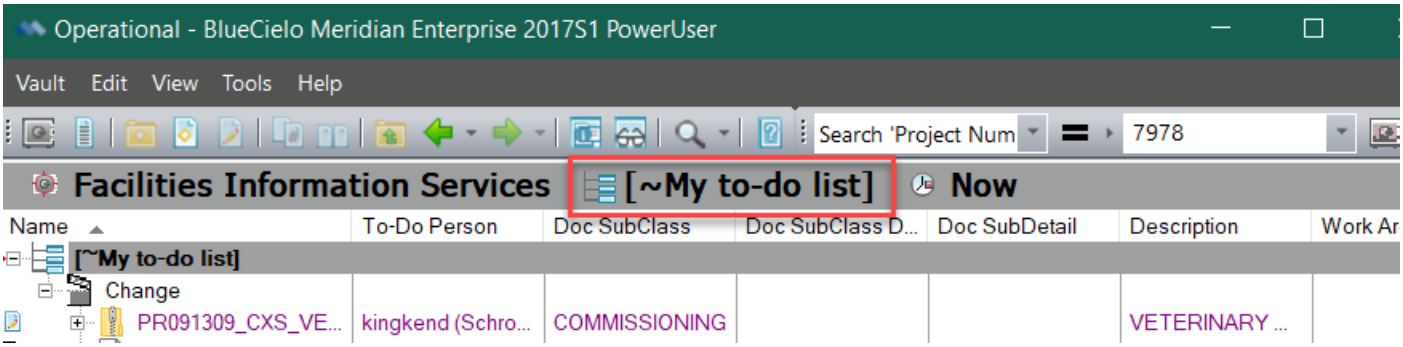


10. Release the Document into Meridian.
    a. **Right-click** on the file
    b. Select **Document Workflow**
    c. Select **Release**
    d. Hit **OK**

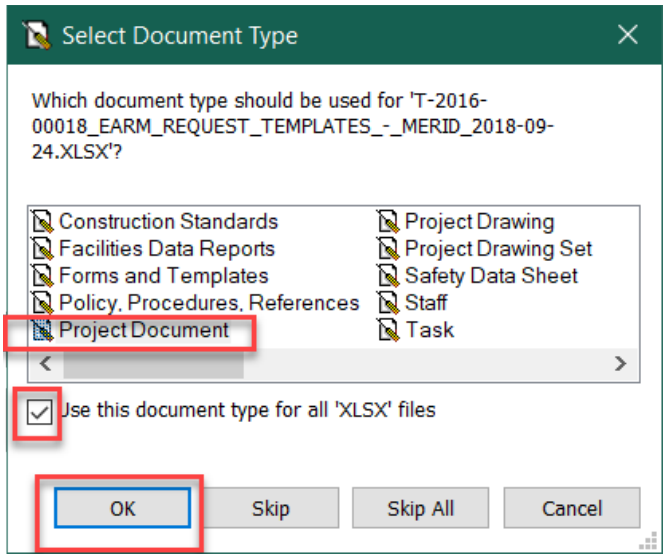


Helpful Hints:

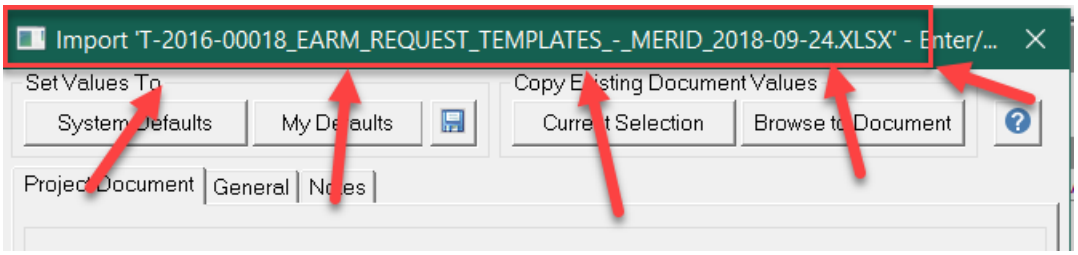
- To view all the files you have under a quick change that needs to be released, you can select the NAV View named **[~My to-do list].**



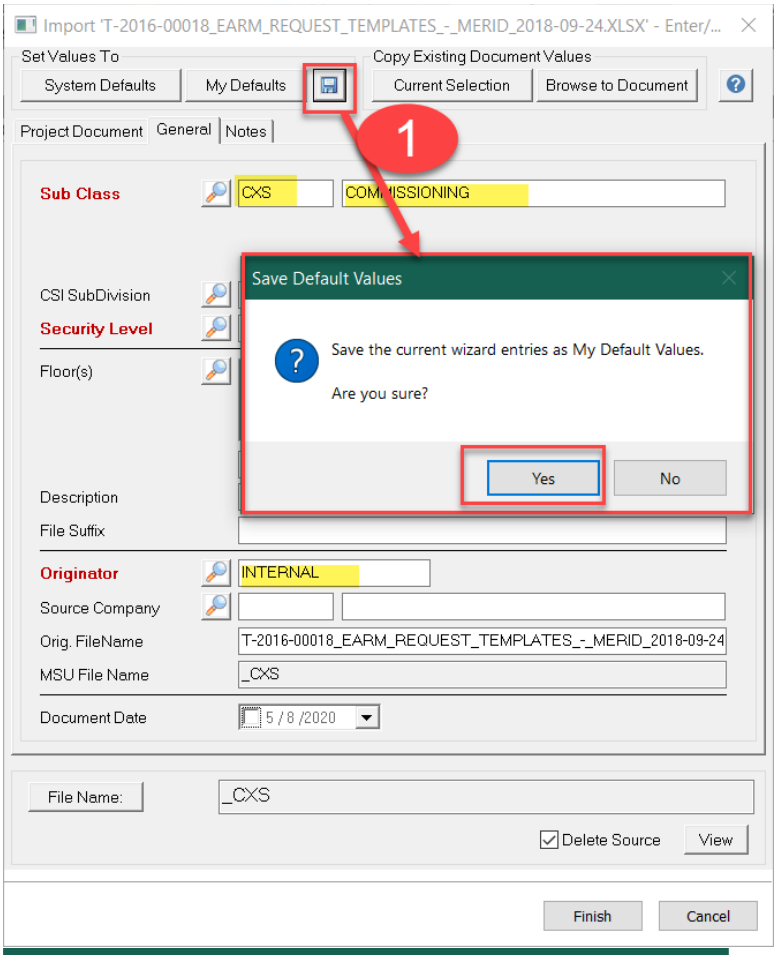
- To Add multiple files at once, you can select them outside the system and drag and drop the whole group in. Select the document type **Project Document** and make sure to **check the box** that Use this document type for all…. Files.

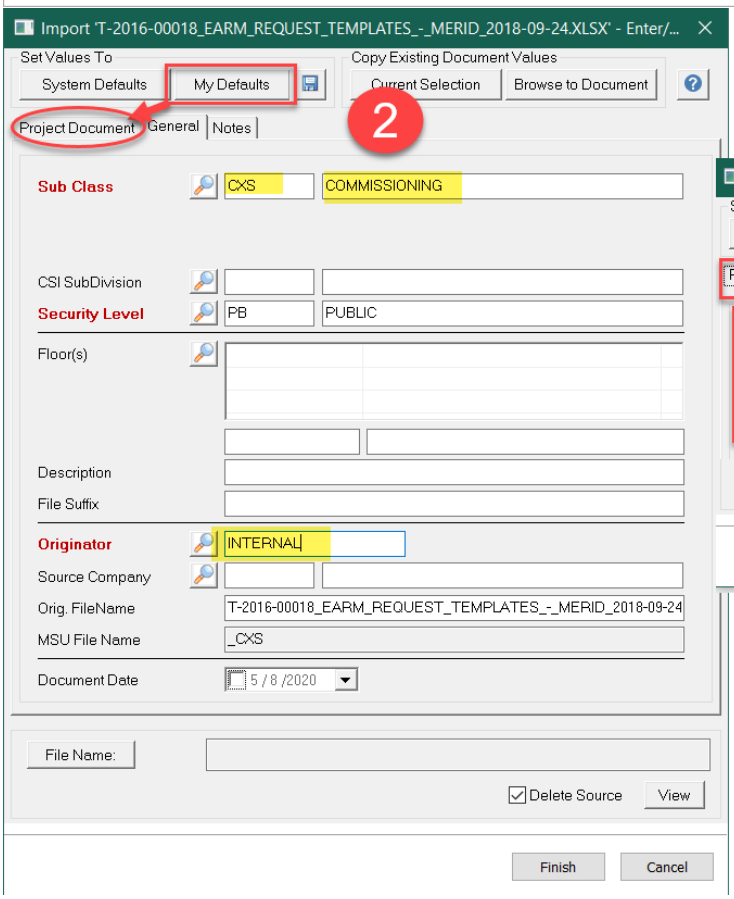


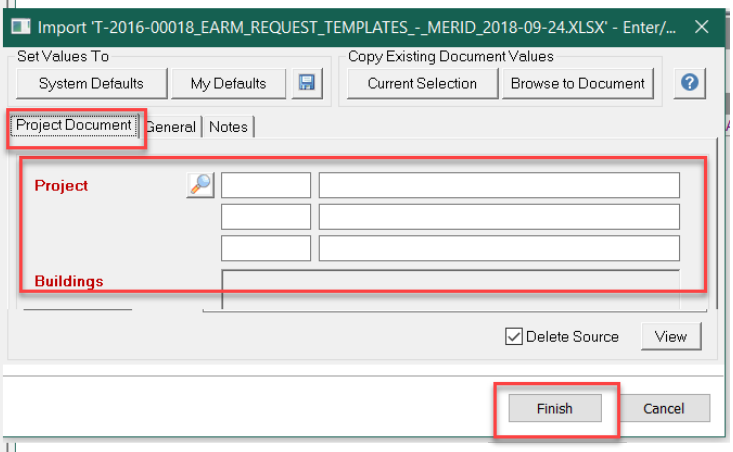
  - If you are adding multiple files at once, **pay very close attention to the top of the add wizard** for which file you are adding. They don't usually add in the same order that they are listed in the network drive.



- **One time set-up to save LOTS of time when adding all these files into Meridian:**
  1. Leave the project field blank, go to the **General** Tab and fill out the **Subclass: Commissioning** and **Originator** fields the way you will always want them, then **click the save button** at the top of the wizard to set these as your default settings.
  2. Then whenever you add files, click **My Defaults** when the wizard opens, fill out the project and click **Finish.**


Import 'T-2016-00018_EARM_REQUEST_TEMPLATES_-_MERID_2018-09-24.XLSX' - Enter/...
Set Values To
System Defaults
My Defaults
Copy Existing Document Values
Current Selection
Browse to Document
Project Document
General
Notes
1
Sub Class
CXS
COMMISSIONING
Save Default Values
Save the current wizard entries as My Default Values.
Are you sure?
Yes
No
CSI SubDivision
Security Level
Floor(s)
Description
File Suffix
Originator
INTERNAL
Source Company
Orig. FileName
T-2016-00018_EARM_REQUEST_TEMPLATES_-_MERID_2018-09-24
MSU File Name
_CXS
Document Date
5 / 8 /2020
File Name:
_CXS
Delete Source
View
Finish
Cancel


Import 'T-2016-00018_EARM_REQUEST_TEMPLATES_-_MERID_2018-09-24.XLSX' - Enter/...
Set Values To
System Defaults
My Defaults
Copy Existing Document Values
Current Selection
Browse to Document
Project Document
General
Notes
2
Sub Class
CXS
COMMISSIONING
CSI SubDivision
Security Level
PB
PUBLIC
Floor(s)
Description
File Suffix
Originator
INTERNAL
Source Company
Orig. FileName
T-2016-00018_EARM_REQUEST_TEMPLATES_-_MERID_2018-09-24
MSU File Name
_CXS
Document Date
5 / 8 /2020
File Name:
Delete Source
View
Finish
Cancel


Import 'T-2016-00018_EARM_REQUEST_TEMPLATES_-_MERID_2018-09-24.XLSX' - Enter/...
Set Values To
System Defaults
My Defaults
Copy Existing Document Values
Current Selection
Browse to Document
Project Document
General
Notes
Project
Buildings
Delete Source
View
Finish
Cancel

Revision History and Owner of Document

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