



MICAD IPR 3.7

FileStore

29/11/2021

Document Version 1.3

Introduction to IPR 3.7 FileStore

IPR 3.7 is a property management system that allows for collaborative exchange of drawings and other documents that relate to the built environment.

For the past 20 years, the interchange of files used a secondary process called FTP (File Transfer Protocol) to upload and perform file management. Once the files are placed on the server hard disk, a secondary publishing action was then required to add the files to the IPR software. Many users found the dual transaction process to be challenging and laborious.

Today, FTP technology is legacy and requires IT support during implementation and approval to clear information governance.

IPR 3.7 has a replacement for FTP; with a new Micad technology we named "FileStore". FileStore swiftly combines file transfer and publishing actions as one transaction and still provides the management tools required to create well-ordered disk content without IT contention or involvement.

FileStore logs all disk files which means systems upgraded from IPR 3.5 do not need any special preparations or changes their existing file system. Once complete, publishers will be able to fulfil their long-awaited disk housekeeping desires without any fear of breaking links to IPR.

FileStore Features

The new FileStore gives you the ability to manage your files with drag-and-drop functionality from your desktop browser to the IPR in one process. Your files are uploaded to the cloud and immediately published to IPR locations and folders.

You can now simply create IPR user accounts and invite colleagues to view and collaborate, you can organise folders and set permissions into your own collections without the need for the Micad support team to create FTP accounts.

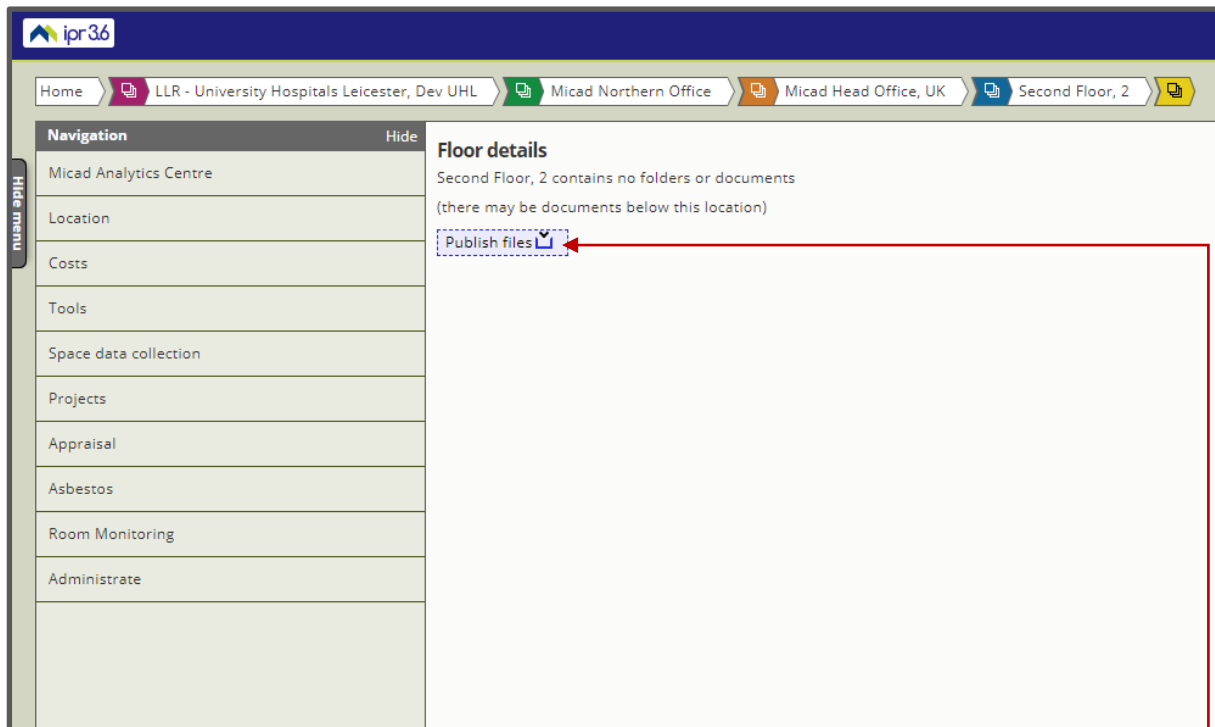
No more file dumping grounds and broken links! FileStore's novel approach file management understands that any given file could be linked up and published in IPR. FileStore provides built in integrity for folder and files copy, move and rename actions. Files may be published in more than one location or module within IPR so a closely guided delete action safeguards broken links and orphaned IPR entries. File overwrites are error trapped and each disk management action triggers the associated corrective database change. What that means is, if you rename a file or folder in the FileStore, all the corresponding links in the IPR are updated automatically.

IPR 3.7 now has its own file attributes. You can now find where a disk file is published within IPR. This new insight improves document exchange productivity, particularly helpful to those familiar with publishing updated document versions. By the same means, it is now possible to identify stored files that are not be published in IPR.

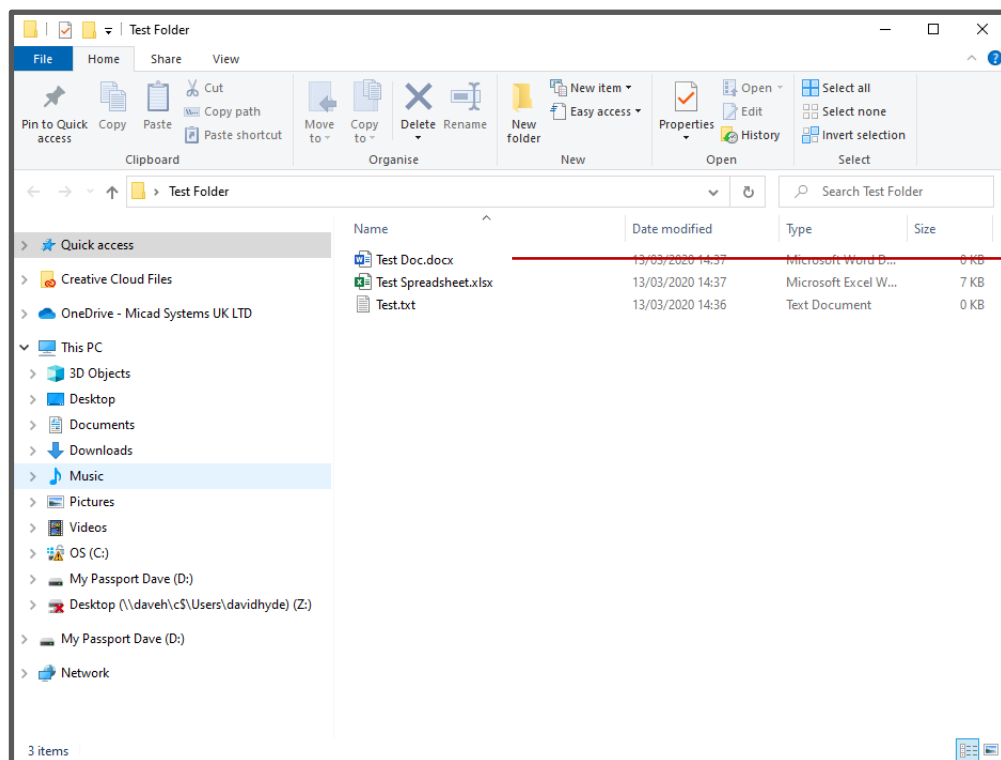
Friendly file types. We have provided greater freedom to store files and share folders in IPR 3.7, so we *whitelist* files that complement everyday working documents. Conversely, we also safeguard against unfriendly content such as executables, scripts, applications or code that might be harmful in any way. You may notice that FileStore uploader blocks unfriendly files with its Intelligent Content Management filtering.

Publishing

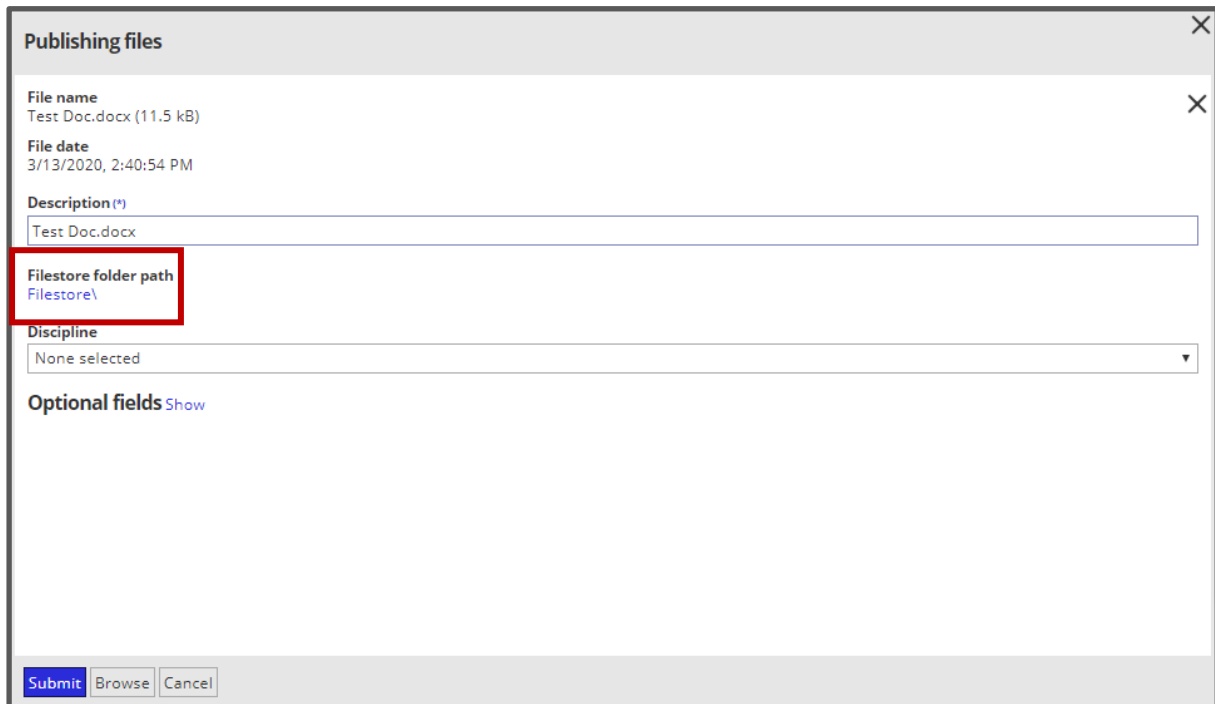
There are two different ways to publish documents. You can drag and drop documents from Windows Explorer to dropzone or click the icon.



You can drag an item from Windows explorer on your own PC and drop this on the Publish files Icon



The following popup then appears with the File name, File Date, Description (This can be edited in the field).



A screenshot of a 'Publishing files' dialog box. It contains fields for 'File name' (Test Doc.docx (11.5 kB)), 'File date' (3/13/2020, 2:40:54 PM), 'Description (*)' (Test Doc.docx), and 'Filestore folder path' (Filestore\). The 'Filestore folder path' field is highlighted with a red box. Below these fields is a 'Discipline' dropdown menu set to 'None selected'. At the bottom, there are 'Optional fields' with a 'Show' link, and 'Submit', 'Browse', and 'Cancel' buttons.

Publishing files

File name
Test Doc.docx (11.5 kB)

File date
3/13/2020, 2:40:54 PM

Description (*)
Test Doc.docx

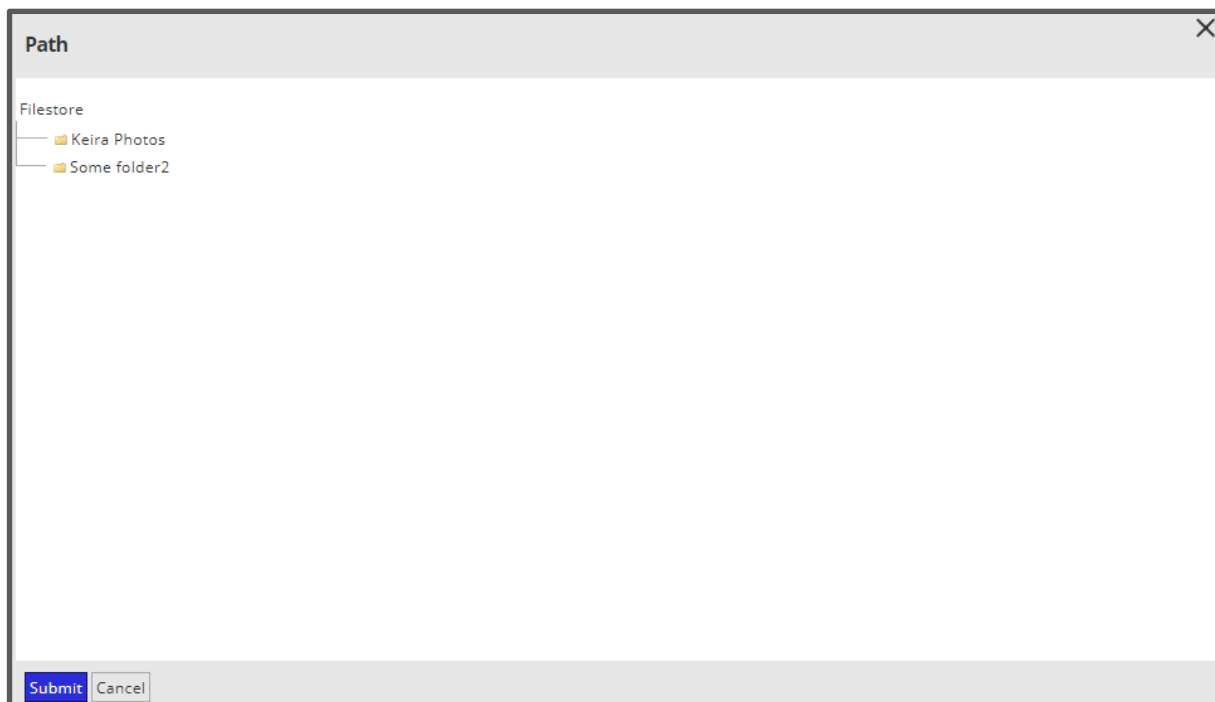
Filestore folder path
Filestore\

Discipline
None selected

Optional fields [Show](#)

Submit **Browse** **Cancel**

Be sure to select a FileStore folder path to keep the file system logical and tidy. Click FileStore (in the red box above) it will send you to the screen below where you can choose the location to save your file and then click submit. If you don't select a folder, it will save in the root of your allowed folder. To select the Discipline of the document, click on the dropdown list and select the appropriate discipline.



A screenshot of a 'Path' dialog box. It shows a tree view under 'Filestore' with two folders: 'Keira Photos' and 'Some folder2'. At the bottom, there are 'Submit' and 'Cancel' buttons.

Path

Filestore

- Keira Photos
- Some folder2

Submit **Cancel**

If you click 'Show' next to Optional fields it displays Expiry date and Keywords if you wanted to add these. Then Click Submit to add the file.

The 'Publishing files' dialog box contains the following fields and controls:

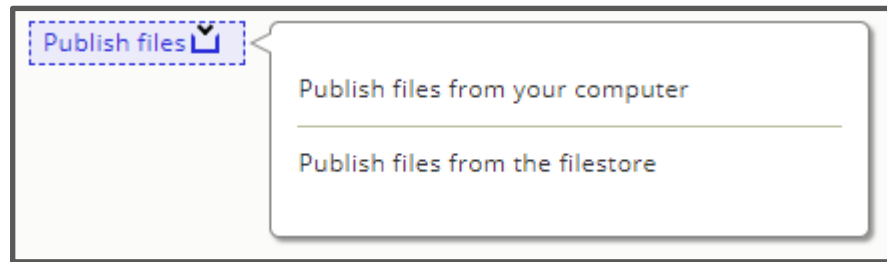
- File name:** Test Doc.docx (11.5 kB)
- File date:** 3/13/2020, 2:40:54 PM
- Description (*):** Text input field containing 'Test Doc.docx'.
- Filestore folder path:** Filestore\
- Discipline:** Dropdown menu with 'None selected'.
- Optional fields:** A section with a 'Hide' link. It contains:
 - Expiry date:** A text input field with the placeholder 'DD/MM/YYYY' and a calendar icon.
 - Keywords:** A large text input field.
- Buttons:** Submit, Browse, and Cancel.

You can add multiple documents at the same time by dragging and dropping multiple documents onto the 'Publish Files' icon. The image below shows a screenshot of multiple files being added. You can set the FileStore folder path and then click Cascade this will copy the path to all files you want to publish. This can also be done with the Discipline.

The 'Publishing files' dialog box shows multiple files being added. The first file is 'Test Doc.docx (11.5 kB)' with a 'Description' of 'Test Doc.docx'. The 'Filestore folder path' is 'Filestore\Some folder2' and the 'Discipline' is 'None selected'. Both the 'Filestore folder path' and 'Discipline' fields have a 'Cascade' button next to them. The 'Optional fields' section is expanded, showing 'Expiry date' and 'Keywords'. The second file is 'Test Spreadsheet.xlsx (8.1 kB)' with a 'Description' of 'Test Spreadsheet.xlsx'. The 'Filestore folder path' is also visible for the second file. The 'Submit', 'Browse', and 'Cancel' buttons are at the bottom.

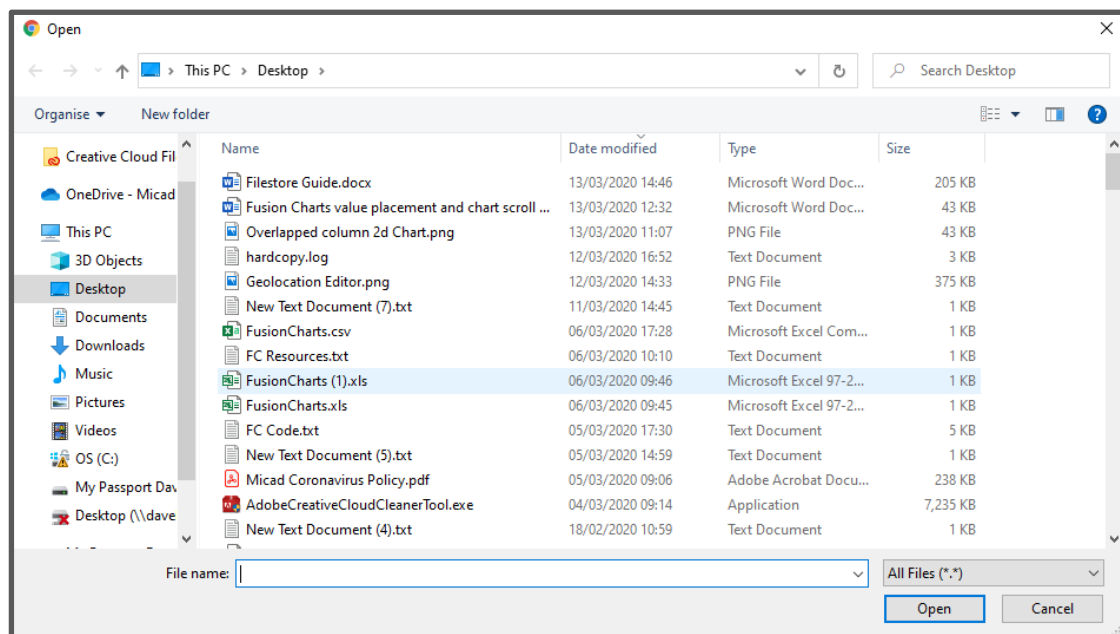
You can also add another file if you click browse and then pick the file you would like to publish.

You can also right Click the Publish files icon and publish files from your computer or from the FileStore.



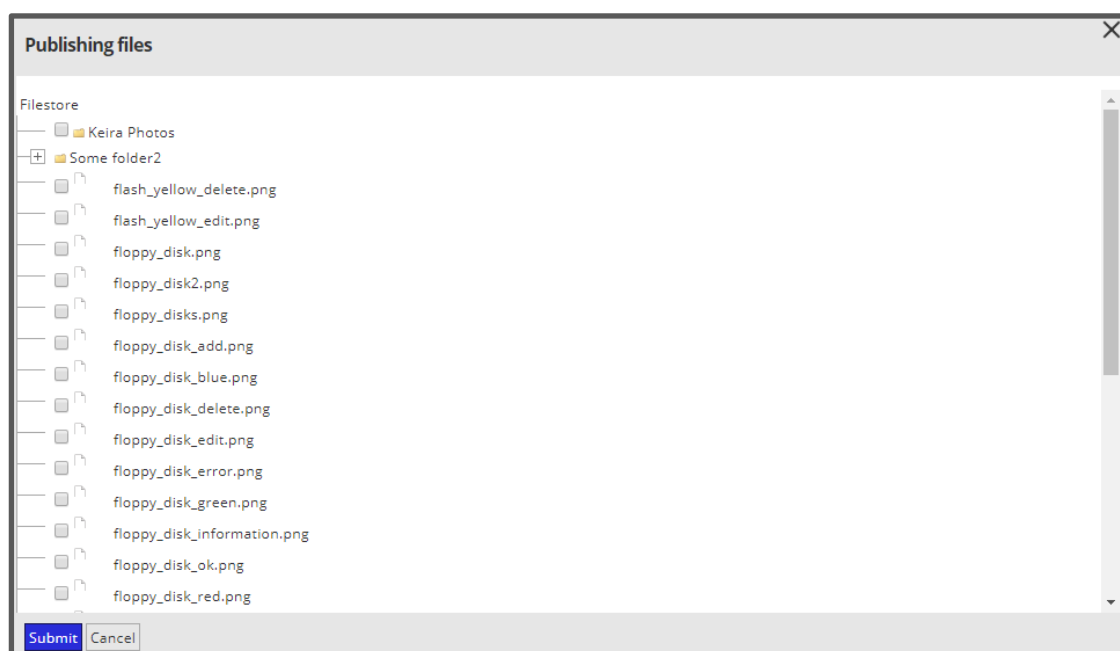
Publish files from your computer

This opens a Windows browser window to select which file(s) you would like to upload. The Publish Files popup then appears like previously.



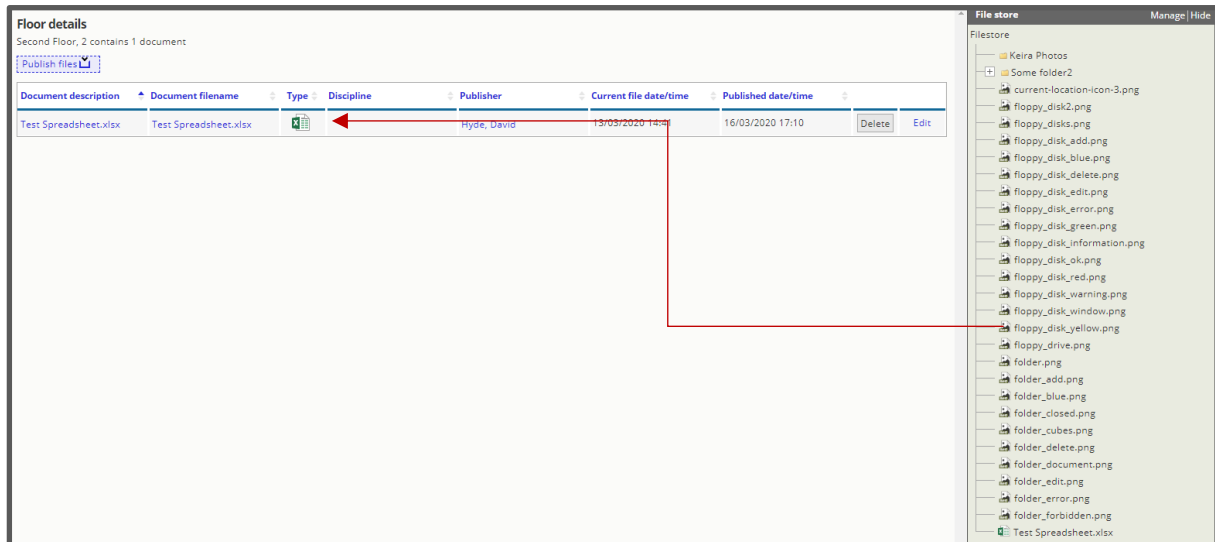
Publish files from the FileStore

Files that have previous been added to the FileStore can be selected by ticking the tick box and then clicking submit this will then Publish the file(s).

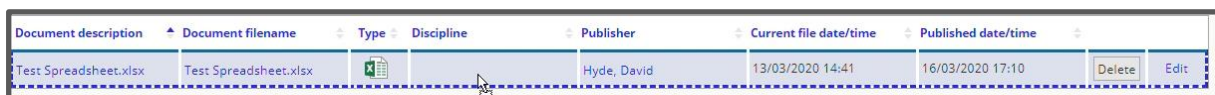


Adding a File from the FileStore to a Location

To add document to a location where there are already documents in the location you can quickly add others by clicking on the Show menu if the FileStore folders and files are not showing. If you then drag and drop the file from the FileStore on top of any document.



You will then see a blue outline around the current document and then take your finger of the button.



Like previously publishing a file the below popup appears so fill in the appropriate fields and press submit.

Publishing files

File name
floppy_disk_yellow.png (2.9 kB)

File date
4/15/2008, 3:35:24 PM

Description (*)
floppy_disk_yellow.png

Filestore folder path
Filestore

Discipline
None selected

Optional fields [Hide](#)

Expiry date
DD/MM/YYYY

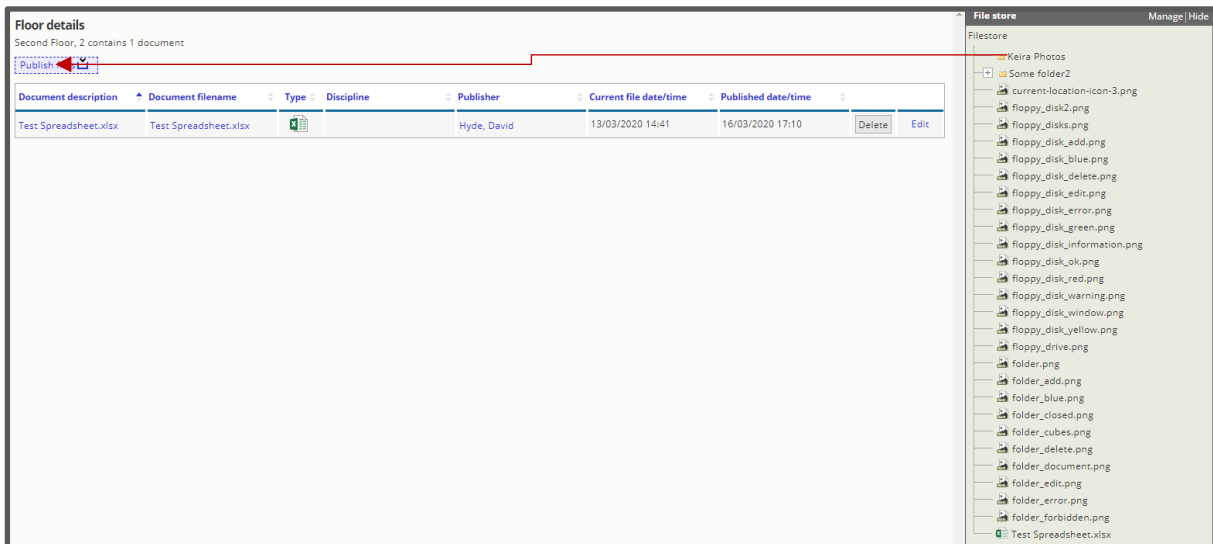
Keywords

You will now see the newly published document at this Location.



Adding a whole folder structure from FileStore

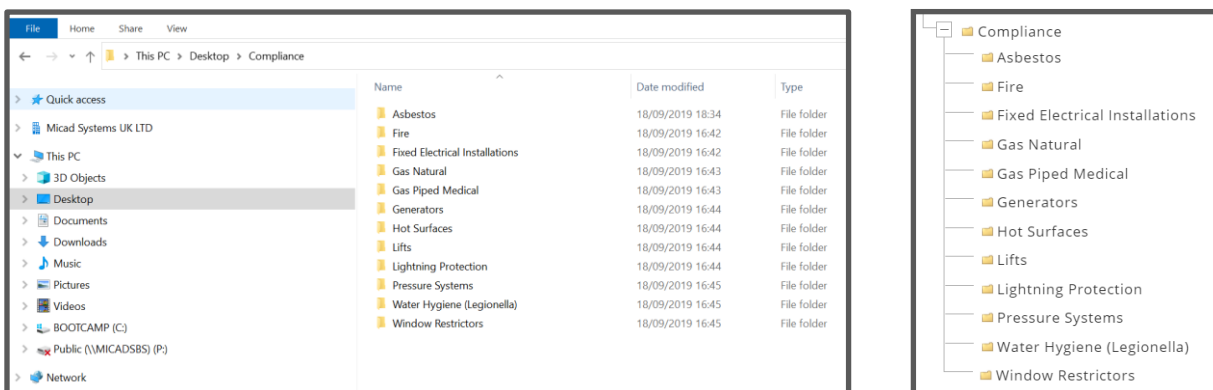
You may wish to publish a full folder structure to an IPR location. These circumstances are common for users with O&M manuals, these documents are often formed of libraries of files where the logical folder plays part in categorising your files. To do this use the right menu to drag the Folder onto the IPR location Publish dropzone.



FileStore will recurse through the structure and recreate this in IPR location, each file will be published in an equivalent of the original disk structure.

Adding a whole folder structure from your desktop computer to FileStore

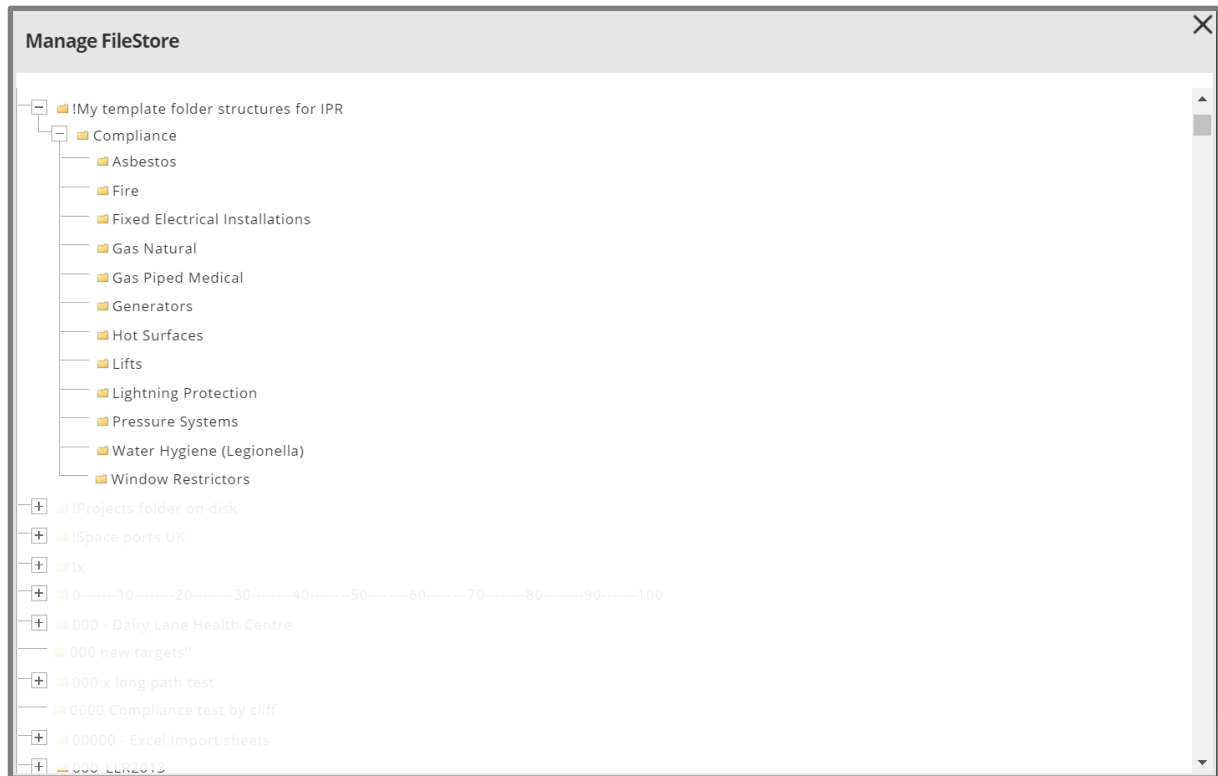
Tip. Its also possible to publish empty folders to FileStore and from FileStore into IPR. After this, you can copy the empty structure to other buildings using IPR Explorer (on left IPR menu)



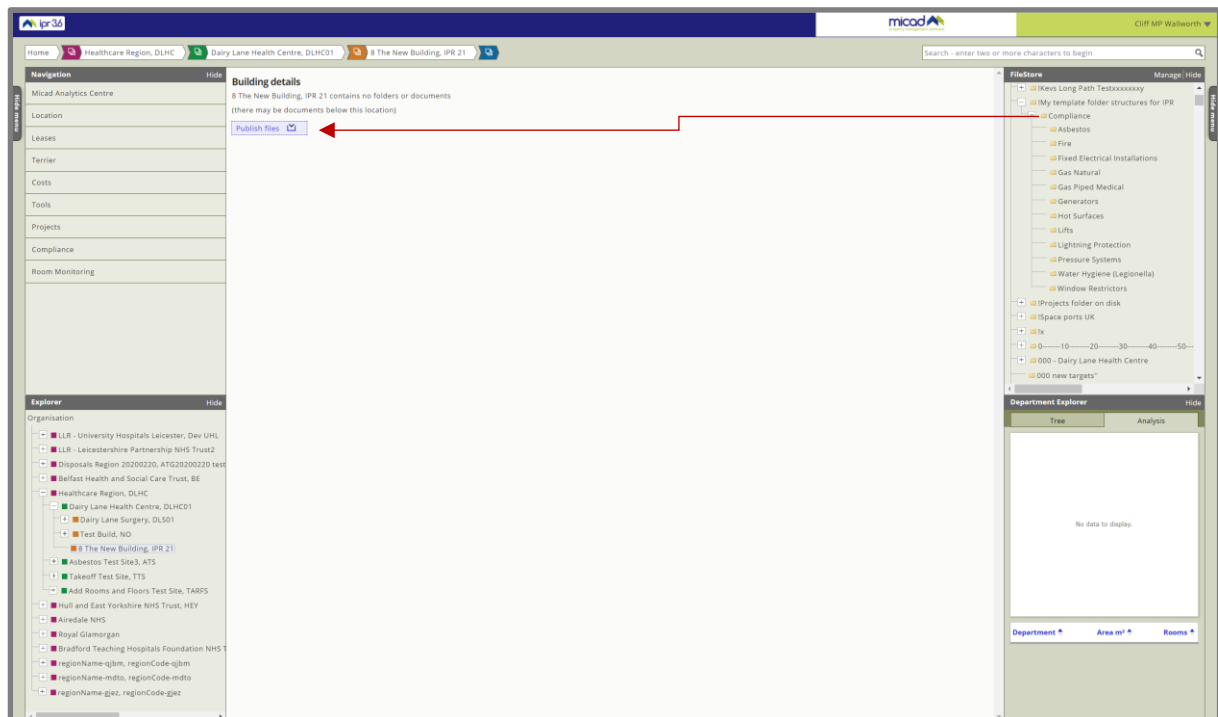
I set out a Compliance folder on My computer Desktop, now I add this structure to IPR via FileStore

From my local PC disk, I can model a folder structure that I want to use as my standard, there are no files in my folders (you can choose to include files too), but I have set them up as I want to see them set out in my IPR at building level. This encourages ongoing users to adhere to your set standards and helps make your data uniform. This concept works well for compliance and O&M record documents. If you are choosing to subcontract project works documentation you can insist that your partners only use these set folder names, it will help you compare building documentation like for like.

To upload your folders, open FileStore (Manage). Open your computer Explorer, drag your folders from your computer Explorer (picking the top folder of the structure), drag this onto FileStore over the target folder. This will copy and upload your folders and files in one go to your chosen FileStore folder.



Open the right menu and drag your folder to the Publish Dropzone



Wait for the files and folder to be published in IPR. This may take a minute or two.

Once the folders and files are published you can see the structure now appears in IPR

The screenshot displays the Micad software interface. On the left, the 'Navigation' pane shows a tree structure of folders and files. The 'Explorer' pane on the right shows the 'Building details' for '8 The New Building, IPR 21'. A red arrow points from the 'Compliance' folder in the Explorer to the 'Compliance' row in the table.

Navigation

- Micad Analytics Centre
- Location
- Leases
- Terrier
- Costs
- Tools
- Projects
- Compliance
- Room Monitoring

Explorer

- Healthcare Region, DLHC
- Dairy Lane Health Centre, DLHCD1
- Dairy Lane Surgery, DLS01
- Test Build, NO
- 8 The New Building, IPR 21
 - Compliance
 - Asbestos
 - Fire
 - Fixed Electrical Installations
 - Gas Natural
 - Gas Piped Medical
 - Generators
 - Hot Surfaces
 - Lifts
 - Lightning Protection
 - Pressure Systems
 - Water Hygiene (Legionella)
 - Window Restrictors
- Asbestos Test Site, ATS
- Takeoff Test Site, TTS
- Add Rooms and Floors Test Site, TARFS

Building details

8 The New Building, IPR 21 contains 1 folder

[Publish files](#)

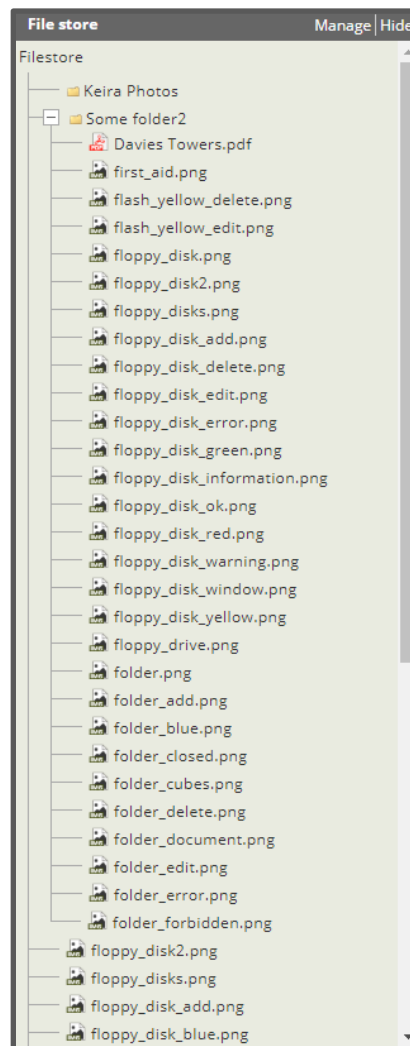
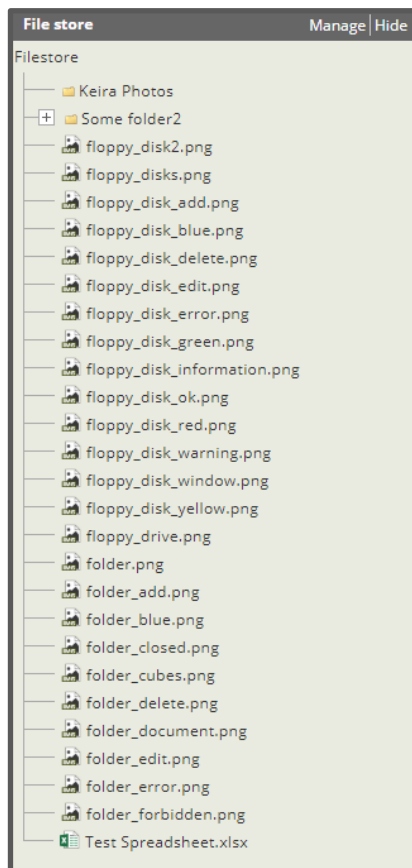
Document description	Document filename	Type	Discipline	Publisher	Current file date/time	Published date/time	
Compliance				Wallworth, Cliff MP	-	13/05/2021 21:05	Edit

To add the structure to other buildings or IPR levels, you can either copy using IPR Explorer (Right click menu) or republish from FileStore.

Viewing FileStore Files

You will see this menu bar on the right-hand side of the page. If you click on this it will expand and display the full content that you can see in the FileStore like FTP. Below Left shows the folders and files. Below right shows the folders and files with the subfolder expanded.

Show menu

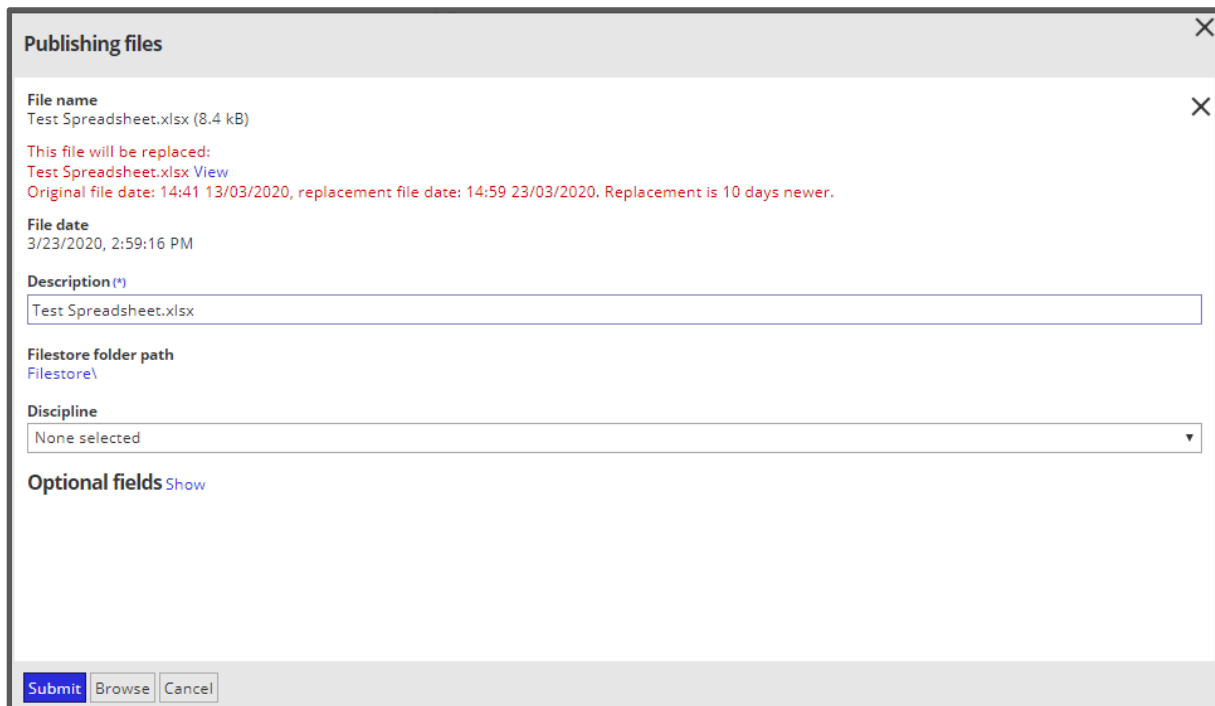


Replacing a Published Document

To replace a Published document with a newer version of the same name you can drag and drop from your desktop onto the current document.

Document description	Document filename	Type	Discipline	Publisher	Current file date/time	Published date/time	
Test Spreadsheet.xlsx	Test Spreadsheet.xlsx			Hyde, David	13/03/2020 14:41	16/03/2020 17:10	Delete Edit

The Publishing files popup appears with a warning stating that you are replacing the current document with the newer version. So, you would fill in the fields you required and click Submit.



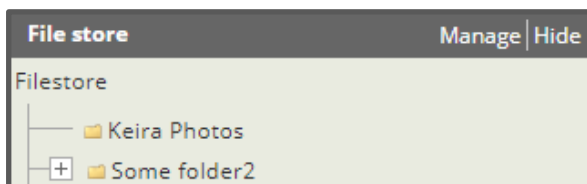
The 'Publishing files' dialog box contains the following fields and information:

- File name:** Test Spreadsheet.xlsx (8.4 kB)
- Warning:** This file will be replaced: Test Spreadsheet.xlsx. Original file date: 14:41 13/03/2020, replacement file date: 14:59 23/03/2020. Replacement is 10 days newer.
- File date:** 3/23/2020, 2:59:16 PM
- Description (*):** Test Spreadsheet.xlsx
- Filestore folder path:** Filestore\
- Discipline:** None selected
- Optional fields:** A link to 'Show' more options.
- Buttons:** Submit, Browse, Cancel

You can save this to another folder in the file structure so you can have both files.

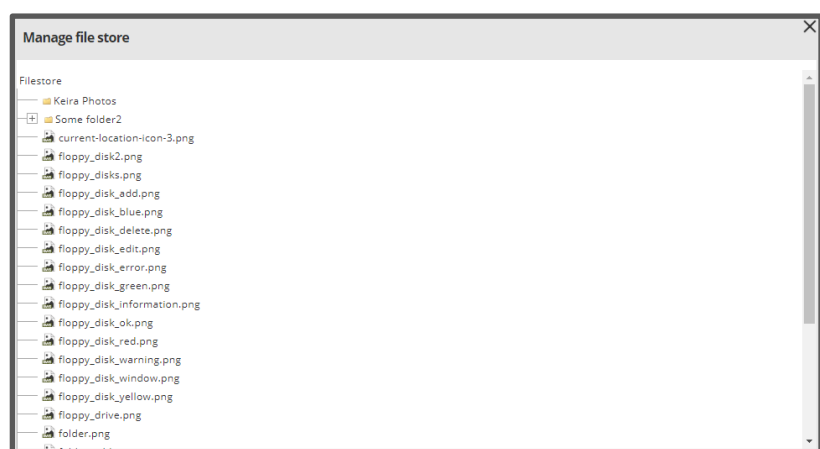
Obviously, you could delete the file and then replace this with the newer file like IPR 3.5.

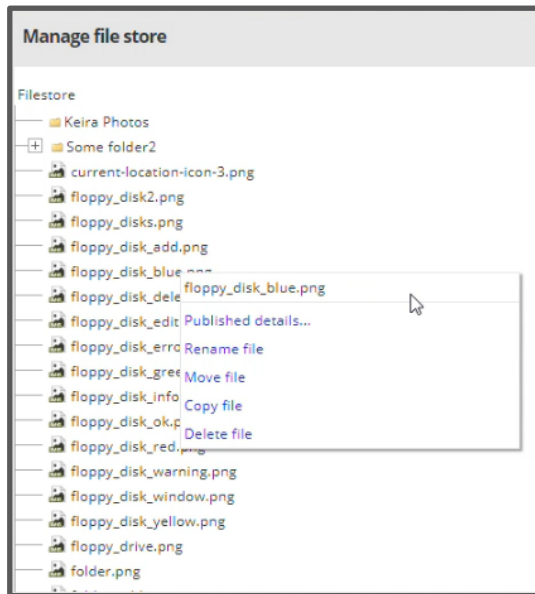
Managing files and folders in the FileStore



Open the FileStore on the right-hand side of the page. Then click on 'Manage'.

This then gives you a list of all your files and folders you have access to.

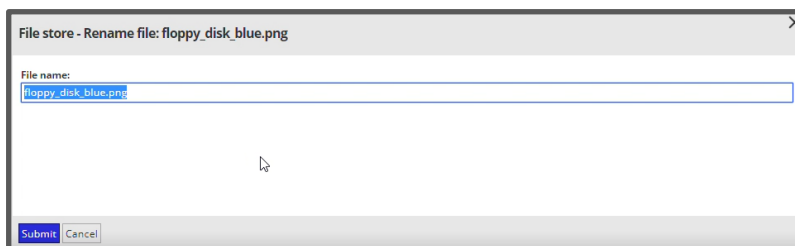
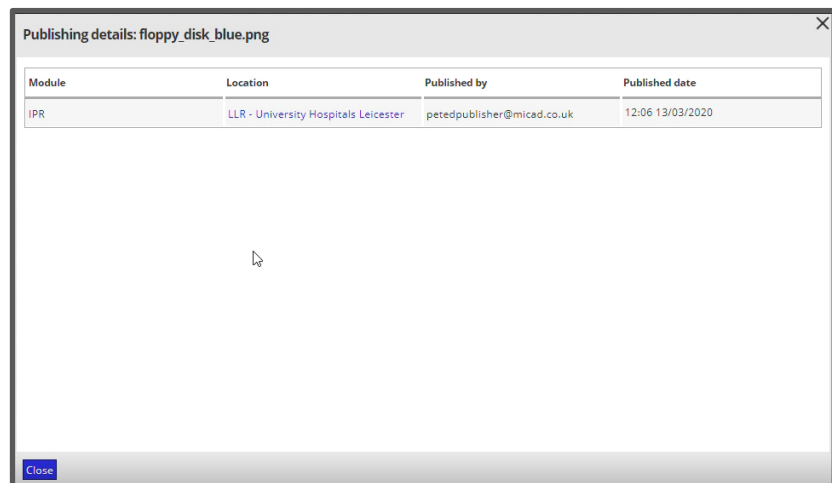




Managing files

When you right click on a File you get the following options (left screenshot). Published details..., Rename file, Move file, Copy file and Delete file.

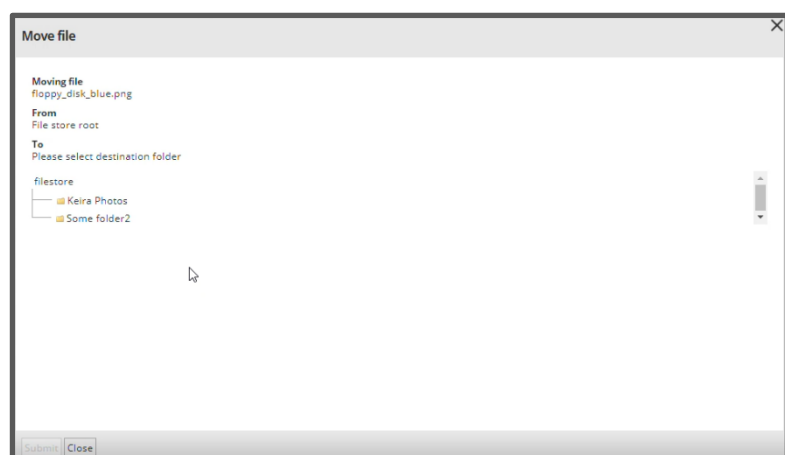
Publishing Details: This gives information about where a file is published.

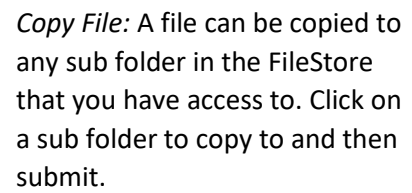


Rename file: A file can be renamed in the FileStore.

Move File: A file can be moved between any folders in the FileStore that you have access to. If you want to move a file into a sub folder just click on the folder and then submit.

When a file has been published and you move the file to another folder NO links are broken anymore.





Delete file

Deleting file
floppy_disk_blue.png

From
File store root

This will remove the file from the following areas:

Module	Location	Published by	Published date
IPR	LLR - University Hospitals Leicester	petedpublisher@micad.co.uk	12:06 13/03/2020

Submit

Close

[illegible]

With folders you have the ability to Rename Folder, Add sub-folder, Move Folder, Copy folder, Create alias for folder and Delete folder.

File store - Rename folder: Keira Photos

Folder name:

Keira Photos

Submit Cancel

Rename folder: You can rename a folder from inside the FileStore.

File store - Add folder to Keira Photos

Folder name:

New folder

Submit Cancel

Add sub- folder: You can create a sub-folder from within a folder.

Move Folder: A folder can be moved between any folders in the FileStore that you have access to. If you want to move a folder into a sub folder just click on the folder and then submit.

When a file has been published and you move the folder into another folder the IPR records are updated to reflect this - NO links are broken anymore.

Move folder

Moving folder
Keira Photos

From
File store root

To
Please select destination folder

filestore

- Keira Photos
- Some folder2

Submit Close

Copy folder

Copying folder
Keira Photos

From
File store root

To
Please select destination folder

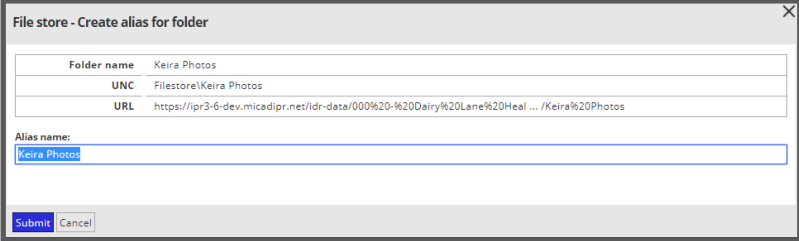
filestore

- Keira Photos
- Some folder2

Submit Close

Copy Folder: A folder can be copied to any sub folder in the FileStore that you have access to. Click on a sub folder to copy to and then submit.

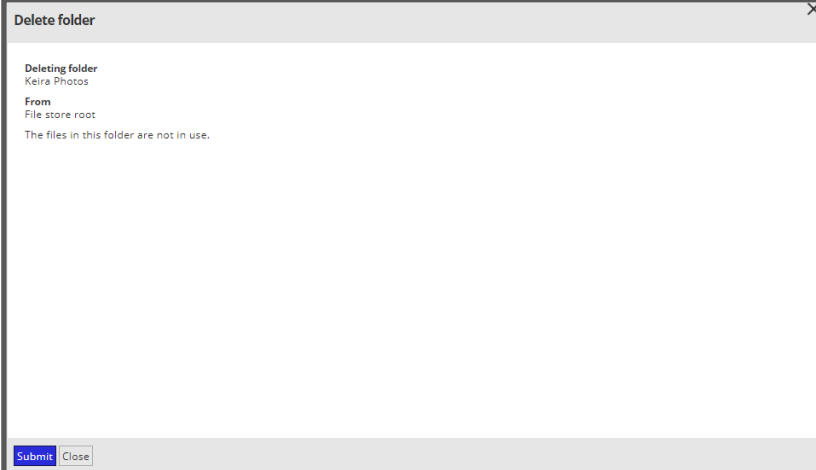
Create alias for folder: This is to create a location on the FileStore that a certain user or users can access.



File store - Create alias for folder

Folder name	Keira Photos
UNC	Filestore\Keira Photos
URL	https://lpr3-6-dev.micadipr.net/idr-data/000%20-%20Dairy%20Lane%20Heal ... /Keira%20Photos

Alias name:



Delete folder

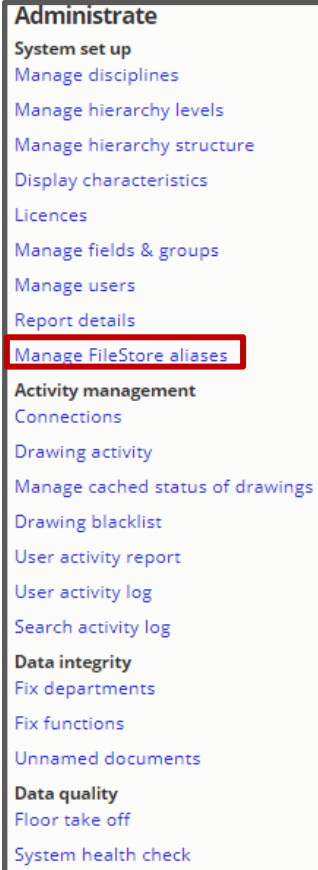
Deleting folder
Keira Photos

From
File store root

The files in this folder are not in use.

Delete Folder: If you want to delete a folder it will display if a file is published from that folder and if so where its published, so you don't delete by accident.

Assigning home folders for users using FileStore Alias



Administrate

System set up

- Manage disciplines
- Manage hierarchy levels
- Manage hierarchy structure
- Display characteristics
- Licences
- Manage fields & groups
- Manage users
- Report details
- Manage FileStore aliases**

Activity management

- Connections
- Drawing activity
- Manage cached status of drawings
- Drawing blacklist
- User activity report
- User activity log
- Search activity log

Data integrity

- Fix departments
- Fix functions
- Unnamed documents

Data quality

- Floor take off
- System health check

To set assign users with an alias first go to Administrate and then click on 'Manage FileStore aliases'.

Below shows the Manage FileStore aliases screen and this displays the aliases already created, how many users have access to each alias, the UNC (Location on the server) and the URL (URL to the location).

Manage FileStore aliases
Add FileStore alias

Alias	Users	UNC	URL		
FileStore root	23	\\micadukazvm001\ldr-data\	https://lpr3-6-dev.micadipr.net/ldr-data/		
000_LLR2013	0	\\micadukazvm001\ldr-data\000_LLR2013\	https://lpr3-6-dev.micadipr.net/ldr-data/000_LLR2013/	Submit	Remove
001_London_Road_352	0	\\micadukazvm001\ldr-data\001_London_Road_352\	https://lpr3-6-dev.micadipr.net/ldr-data/001_London_Road_352/	Submit	Remove
360Photographs	1	\\micadukazvm001\ldr-data\360Photographs\	https://lpr3-6-dev.micadipr.net/ldr-data/360Photographs/	Submit	Remove
DaveH Documents	2	\\micadukazvm001\ldr-data\000 - Dairy Lane Health Centre\Public\DaveH\	https://lpr3-6-dev.micadipr.net/ldr-data/000%20-%20Dairy%20Lane%20Health%20Centre\Public\DaveH/	Submit	Remove
Empty folder	0	\\micadukazvm001\ldr-data\000 - Dairy Lane Health Centre\Empty folder\	https://lpr3-6-dev.micadipr.net/ldr-data/000%20-%20Dairy%20Lane%20Health%20Centre\Empty%20folder/	Submit	Remove
Kev's test images	1	\\micadukazvm001\ldr-data\Kevs test images\	https://lpr3-6-dev.micadipr.net/ldr-data/Kevs%20test%20images/	Submit	Remove
OLD Docs alias	0	\\micadukazvm001\ldr-data\OLD Docs\	https://lpr3-6-dev.micadipr.net/ldr-data/OLD%20Docs/	Submit	Remove
PDRoot	0	c:\ldr-data\	http://localhost:667/ldr-data/	Submit	Remove

You can also add another FileStore alias at the top of the screen if you click on the link 'Add FileStore alias' and this is setup the same as previously. Alias names can also be edited here just click submit and the new name is saved. To remove an alias just click remove and this will delete it.

If you then click on 'User alias assignment' which is under 'Administrate' on the left menu, this will then display all users and the alias associated to that user (Below). If you click on the drop-down list, you can select what alias a user can see. The default is set to 'Please choose' which means no access to use the FileStore. For a user to have full access to all folders select 'root' as their alias. Again 'Add FileStore alias' at the top of the screen will let you create a new alias as shown earlier.

User FileStore aliases
Add FileStore alias

User Name	Email	Alias
365 Cliff Wallworth	cliffwallworth@micad.co.uk	root

Please choose
 000_LLR2013
 001_London_Road_352
 360Photographs
 DaveH Documents
 Daves Folder
 Empty folder
 Kev's test images
 OLD Docs alias
 PDRoot
root