



## Release notes

Micad IPR 3.9

02/09/2024

Document Version 3.6



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## Introduction

In this IPR release 3.9, we have introduced some great new features. There's a new application launcher that we have named HUB. HUB is a multi-tenant service where all clients access from the same web URL. We have applied the next generation User Interface (UI), it aligns IPR to the modernised Portals 3 look and feel. There's an entirely new Reporting service that sits better and logically outside IPR.

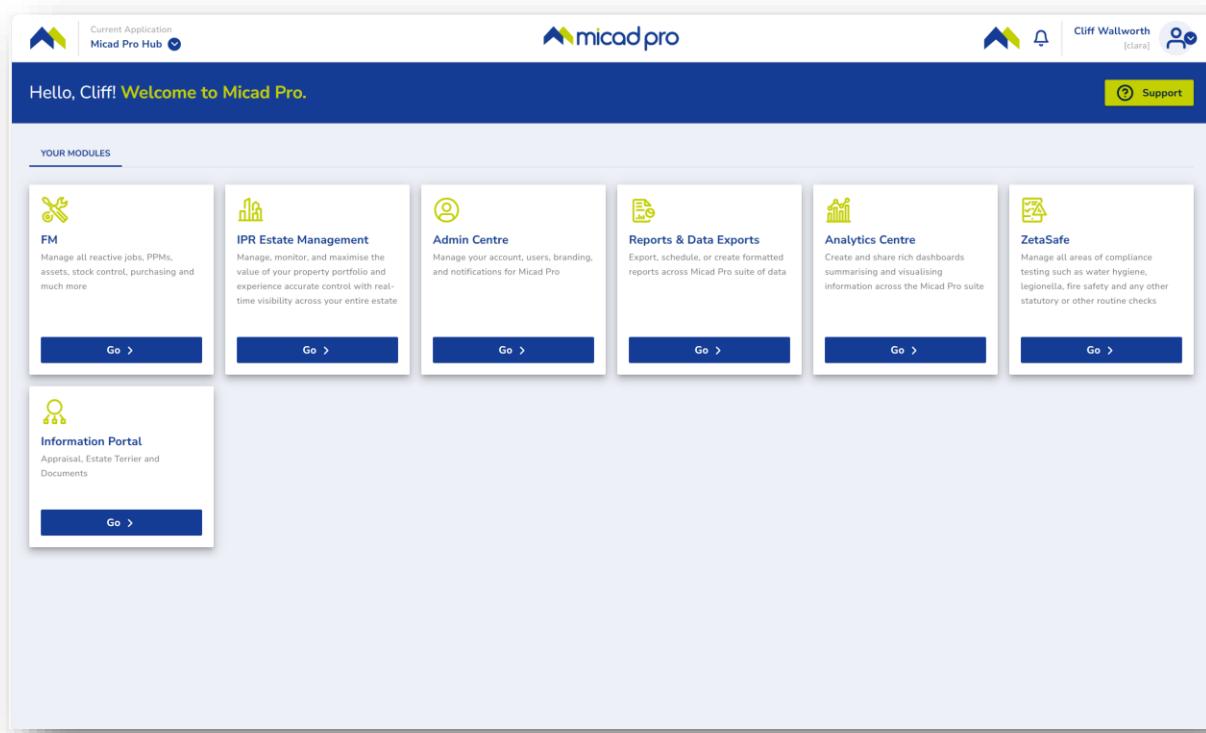
In this IPR release the Leases and Terrier Modules have had some additional fields added commensurate to NHS in Scotland methodologies. The Appraisal module has undergone some major changes that will be available to meet survey standards of the NHS in Scotland (NHSS). These NHSS specific features are switchable by Micad via backend configuration.

## New features for IPR 3.9

- New Micad Pro HUB platform service
- New Reporting service
- New Admin centre (User Management and product branding)
- New 2FA authentication
- New corporate branding feature (NHSScotland specific changes)
- IPR 3.9 standard UI style
- New appraisal module feature to accommodate NHSScotland 6 Facet Backlog methodologies
- Leases and Terrier module (NHSScotland specific changes)
- Legacy features moved from within IPR out to HUB

## Introducing Micad Pro HUB

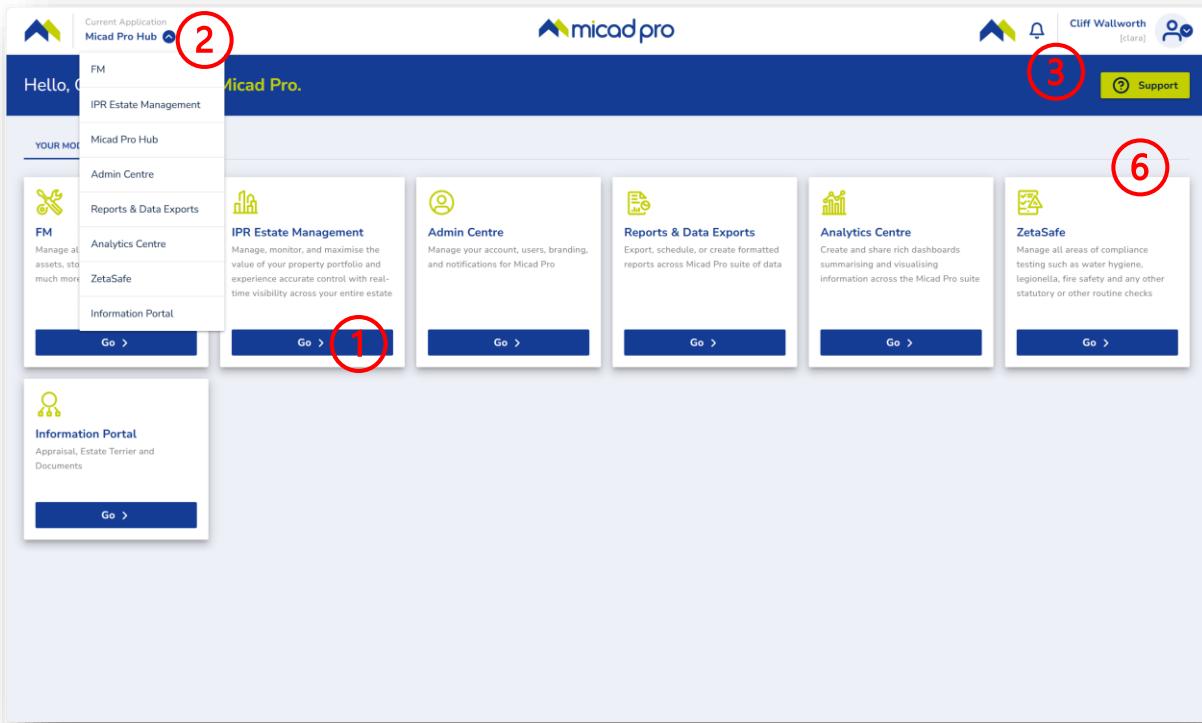
HUB is the home for the Micad Product Suite. A new standard feature which appears at login.



HUB is the platform application launch pad. All of the Micad products will become accessible via the HUB platform. You can still store direct links into each application as you have traditionally, but for new system users it's a good idea to share the home URL for the HUB.

## HUB features and navigation

1. Launch the application – click on the Go button
2. Switch between applications
3. Identify your client key (CID) – “Clara”



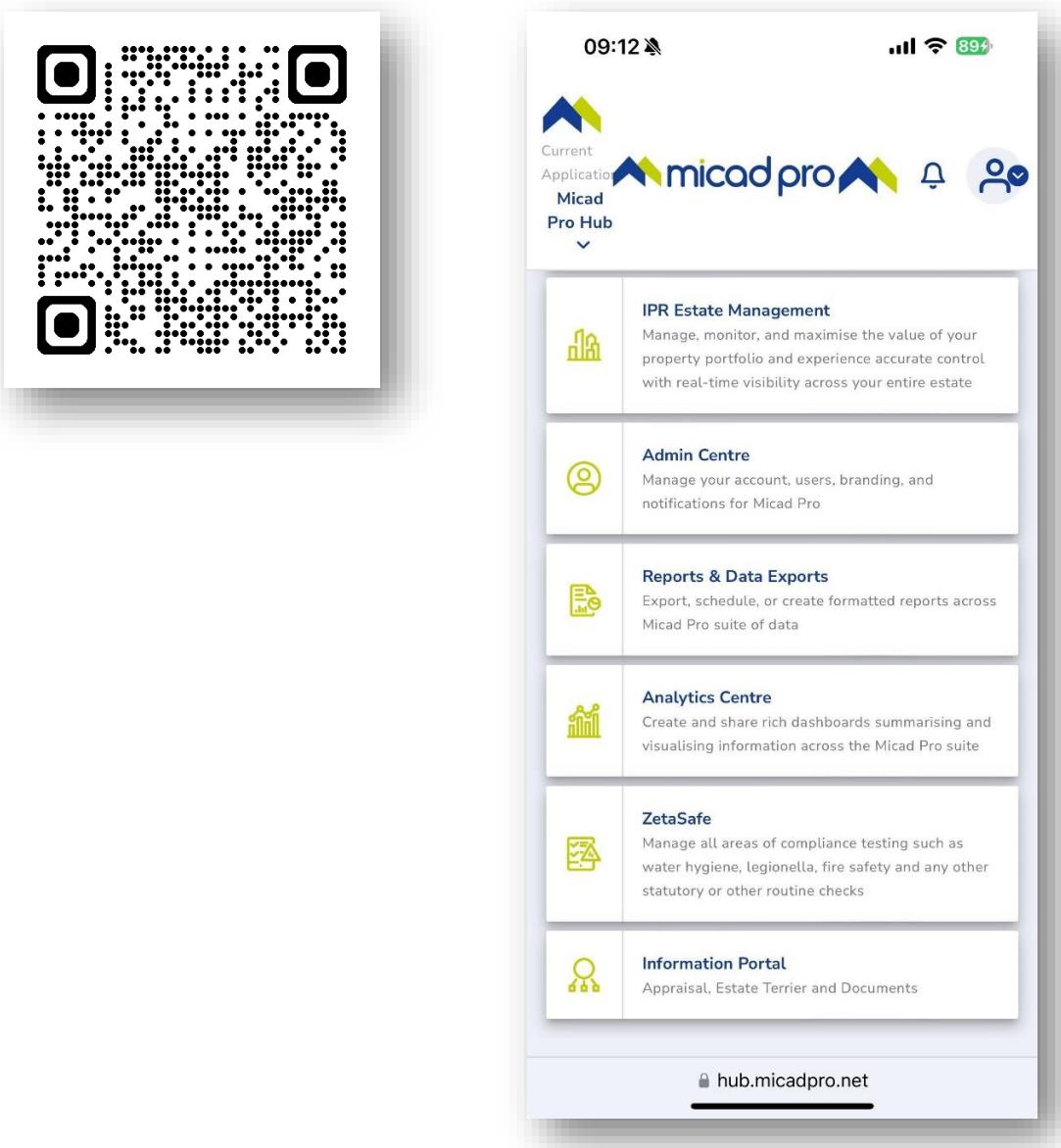
4. Sign out of the HUB and all applications
5. About - Identify the application version
6. Get help from Micad support
7. Homepage link – click the Micad icon

## How to access Micad Pro HUB

To access HUB from desktop, bookmark this link

<https://hub.micadpro.net/>

From a mobile scan the QR and bookmark URL on the device



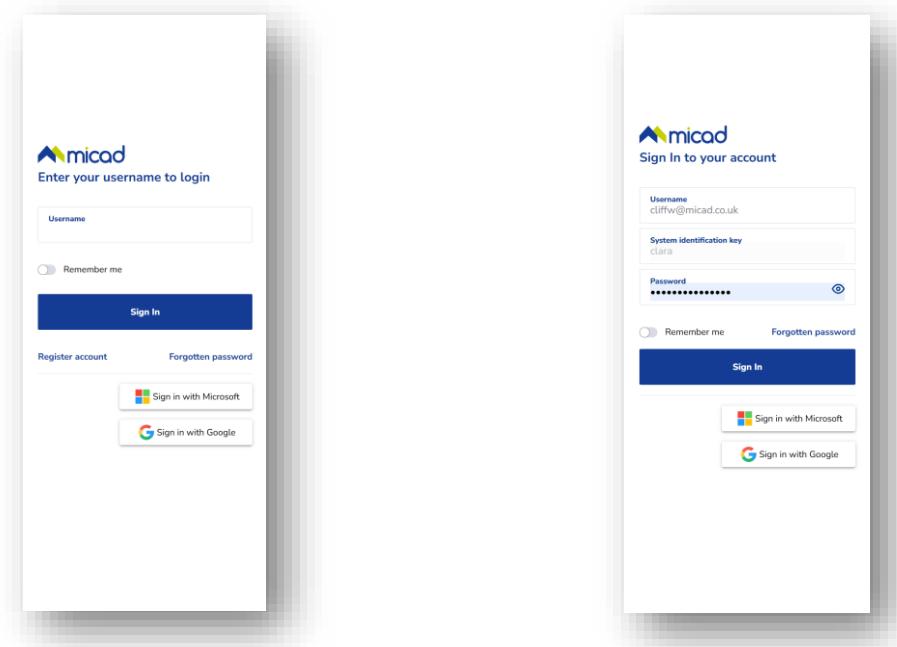
*Universal QR code for HUB*

*HUB displayed on mobile phone*

**Note.** If you have access to more than one IPR (as a contractor/service provider) you will be given a list of your associated systems beyond the login.

## How to sign in to HUB

When you set up your users, make sure you fill out their contact details and provide a mobile number where possible. This provides another means of contact verification for the 2FA process when that's enabled. For existing IPR users, review your user accounts using the Admin centre, update where necessary and this will reduce the labour of the 2FA process. You can use the Classic IPR email account or SSO if you have it setup in your browser.



*The HUB login, home of the whole system*

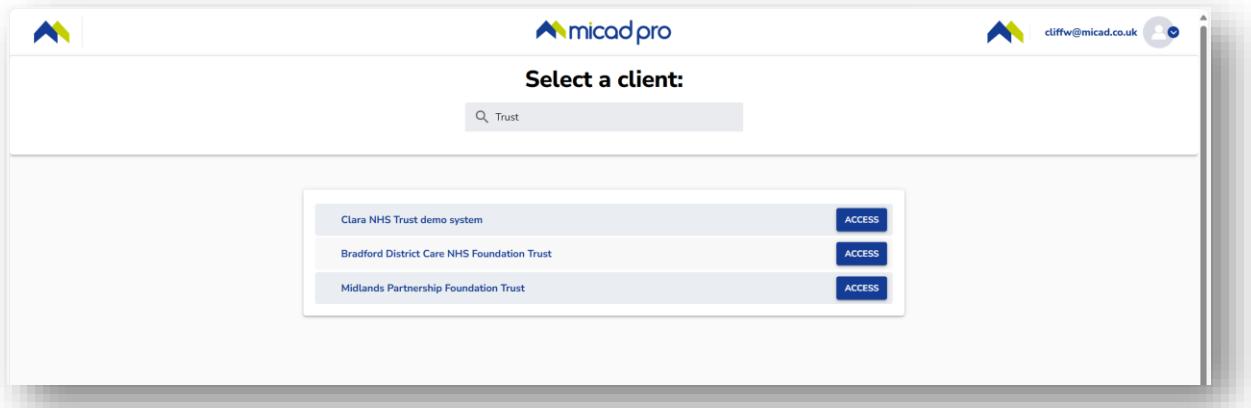
*Direct IPR login, you will see the System ID*

**Note.** You can still share direct links to IPR with your colleagues and contractors. The direct option will show the System ID but will bypass having to land on the HUB first.

Direct system link sharing will not bypass the need to pass the 2FA verification.

If you have access to more than one IPR (as a contractor/service provider) you will be given a list of your associated systems beyond the login.

## System selection



The system selection screen only shows when you have a valid account on more than one system. If you wish to bypass the system selection process, share the direct links within the HUB applications.

The MICAD product suite is branded for NHSScotland in the name of SAMS

For NHSScotland, Micad product bears the product name SAMS (Strategic Asset Management System).

New features of the Micad HUB platform allows for Branding. We use this feature to provide corporate themes with images and narratives that will show in each application header and logon screens.



Application example showing HUB

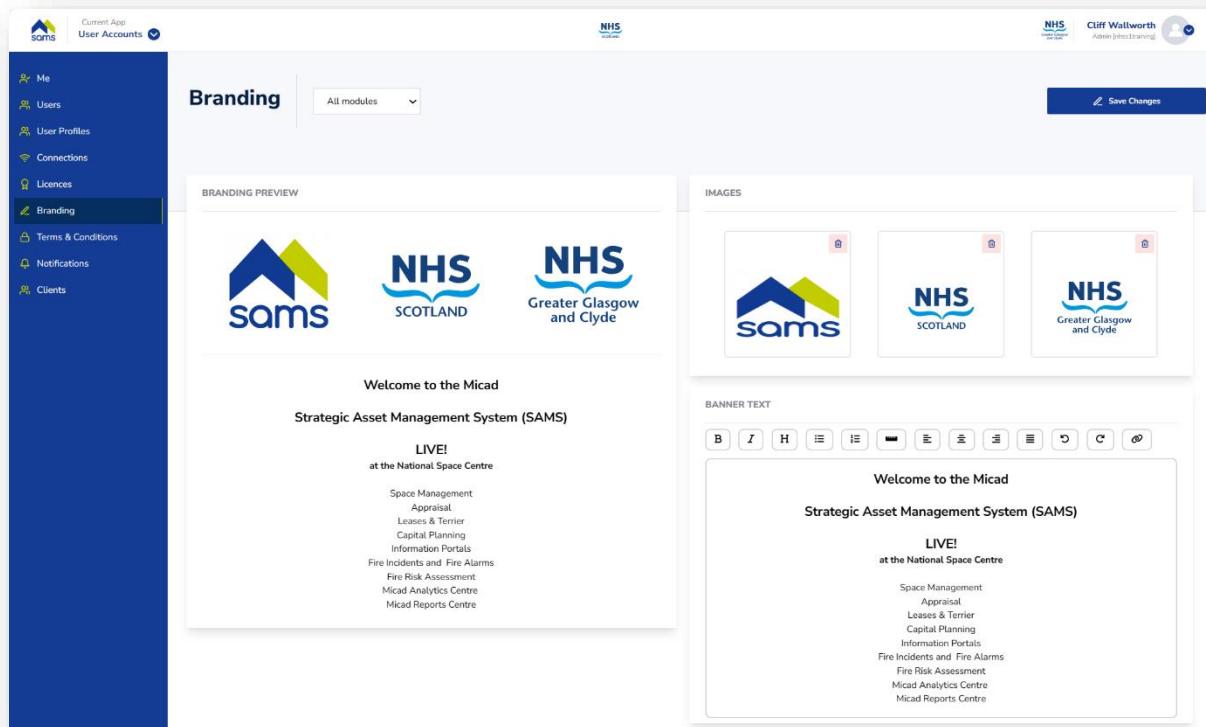


Three images can be used within the top menu area to personalise your system.

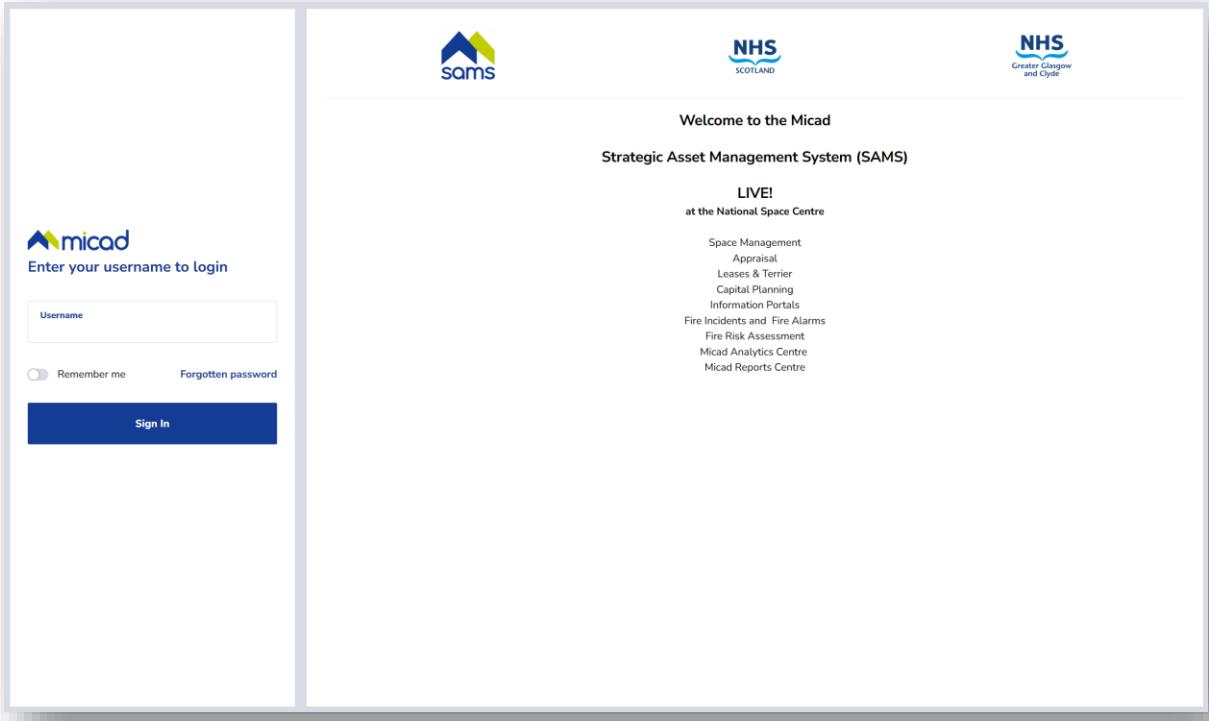
## Corporate branding

Micad can apply corporate branding to your HUB and suite of applications. If you have high quality images or even vector SVGs and a mission statement, please contact your account manager with the materials.

The example shows how the NHSScotland SAMS system is branded using HUB's Admin centre.



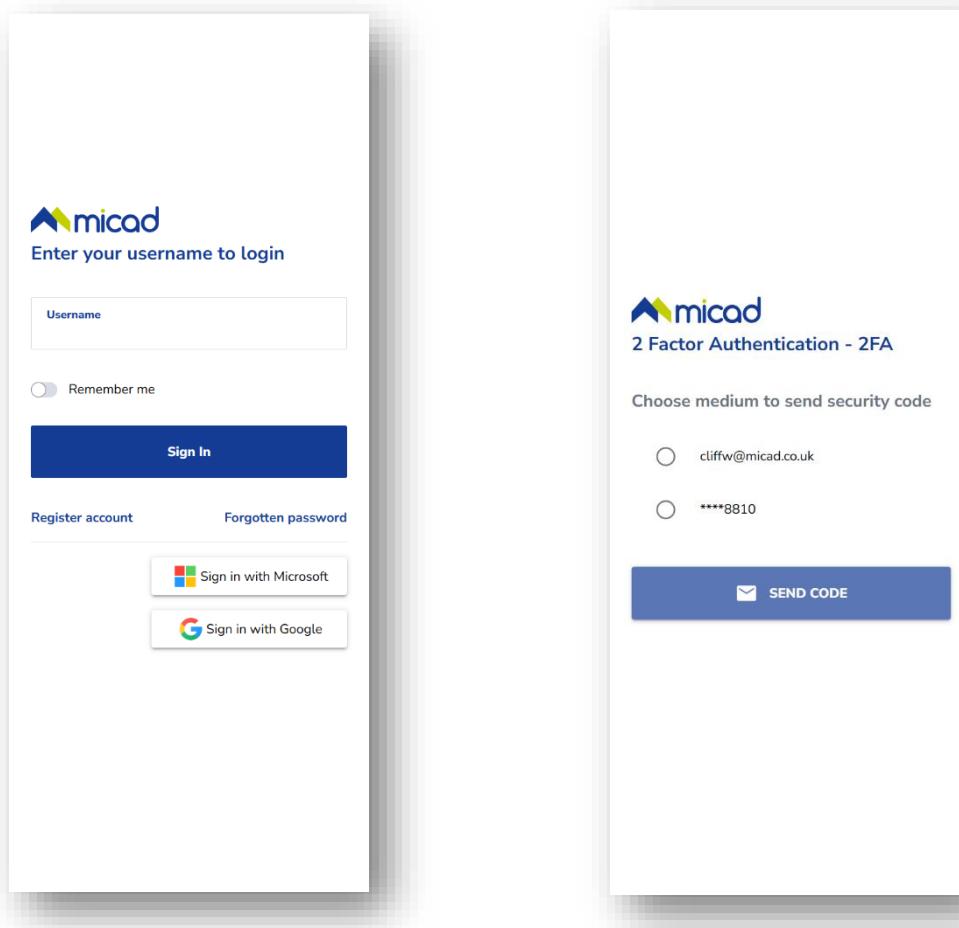
Branding can be set up by Micad. Images applied by drag and drop, a text box is offered for the login screen.



The login page could be used to show a welcome message or a mission statement.

## 2FA Authentication

The Micad HUB service now supports two factor authentication 2FA, this can be enabled by request to Micad support. When 2FA is enabled, all Micad applications and all system users are required to provide the second level of access verification.



*Enter your HUB user account Log in*

*Choose from email or mobile*

### Notes

If your user account has a mobile number, 2FA will offer a choice of SMS text message.

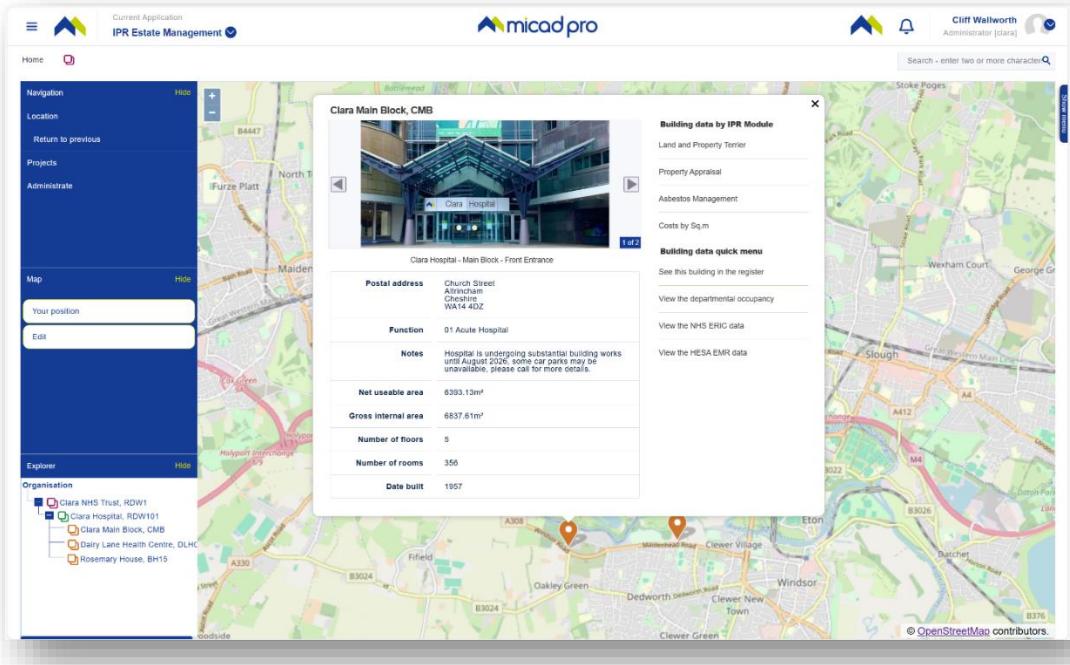
You need to retrieve and **enter the 6 digit code within a 30 minute period**. If you miss this timeframe, click on Resend code and another email will come through.

The 30 second resend count down relates only to a limit to prevent users from keep clicking Send too many times.

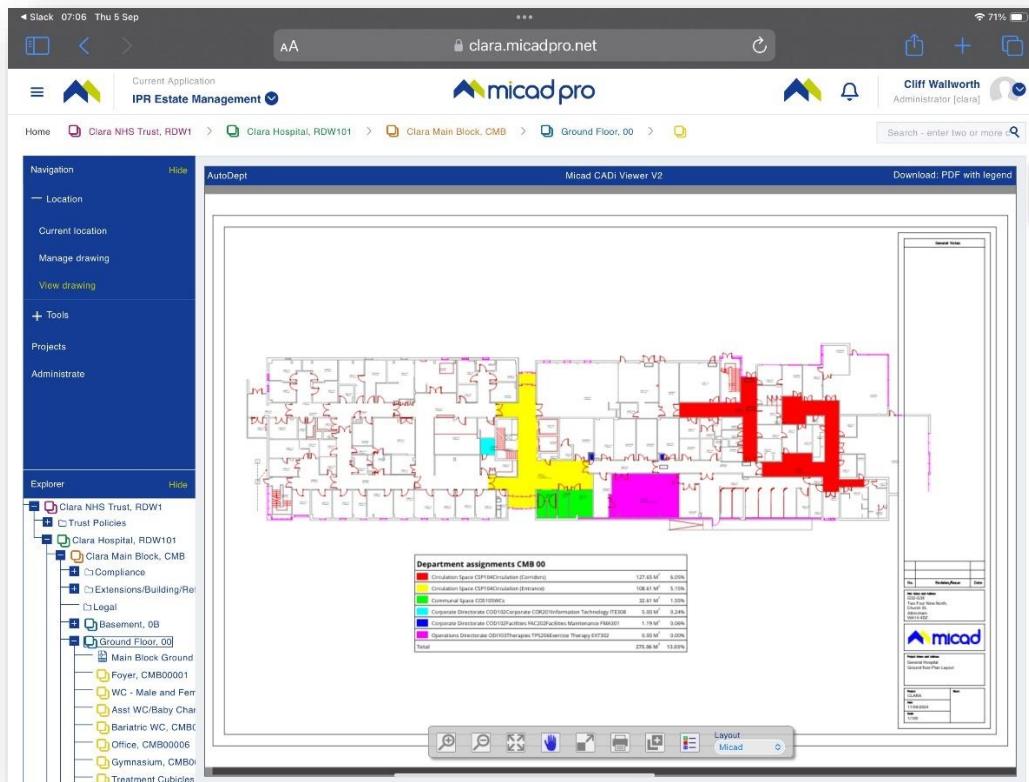
If access on a mobile device, an SMS text message will be sent to you. This can simplify and reduce the labour of reading and copy/paste codes from email. The device's browser will pick up the code from the message automatically.

## IPR 3.9 User interface

IPR's new UI (User Interface) has been restyled inline with the Micad application suite.



Along with the obvious colour scheme changes, there are some minor changes on forms and form controls where modernisation has taken place. The left menu has been tidied up and uses a logical structure, otherwise the functionality and left menu order and content remains the same.



## NHSScotland specific variations of IPR, Leases, Terrier and Appraisal Modules.

### Appraisal Module (SAMS) variant

For SAMS users, considerable changes have been made in the Micad Appraisal module specifically to meet The NHS in Scotland methodologies. The module has been redesigned to meet the requirements set out in [NHSS Appraisal manual version 6](#).

- Level zero - The NHS in Scotland (National)
- Level one - NHS **Board** / Organisation
- Level two - Site level
- Level three - **Block** level (physical block) a building or sub divided building
- Level four - Location level (Floor level)
- Level five - Room Level

For a SAMS implementation, some terminology changes have been made in the 5-tier hierarchy. Namely level One (renamed to Board) and Level Three (renamed to Block).

## Leases and Terrier module (SAMS) variant

For SAMS users we have added NHS Scotland specific fields to the Terrier module. The Leases Module needed some labels and lookups changed.

The screenshot shows the SAMS Terrier module interface. On the left, a navigation sidebar lists various options: Navigation, Terrier, Location information (which is highlighted with a red box), Construction data, Legal tenure, Charges and values, Acquisitions and disposals, Planning constraints, Contacts, and Return to previous. The main content area is titled 'Essential Services Block B Main View'. It contains a form with the following fields:

- Function: 24 Support Facilities
- Planning use class: Please choose
- Status: Occupied
- No. of floors/levels: 2
- No. of rooms/spaces: 33
- Clinical use: Non-Clinical
- Estates reference: 297-304
- Last refurb: DD/MM/YYYY
- Future plan: To Be Retained
- Essential:
- Temporary:
- Lifecycle assess:
- Division: NHS
- Ownership: Owned
- Public transport: Please choose
- On-site parking:
- Setting: Please choose
- Heated volume: 1713.23
- File reference

At the bottom of the form are 'Submit' and 'Cancel' buttons. A red box highlights the entire configuration section on the right.

Terrier at Block level: Under Location information (SAMS only)

The screenshot shows the SAMS Terrier module interface, similar to the previous one but with a different focus. The navigation sidebar is identical. The main content area shows the same form fields as the previous screenshot, but with a red arrow pointing to the 'Ownership' dropdown menu. The 'Owned' option is selected. The dropdown menu also includes other options: Endowment, Held, Leased, and PFI/PND.

**Note** NHS for Scotland “Tenure” status is set at block level using the **Ownership** dropdown combo

The screenshot shows the 'Terrier' application interface. On the left, a navigation sidebar lists various modules: Navigation, Terrier, Location information (highlighted with a red box), Construction data, Legal tenure, Charges and values, Acquisitions and disposals, Planning constraints, Contacts, and Return to previous. The main content area is titled 'State Hospital - Front Entrance' and contains a 'Manage images' button. The 'Location information' section is expanded, showing fields for 'Function' (05 Mental Health Hospital), 'Planning use class' (Please choose), 'No. of Buildings' (19), 'No. of floors/levels' (40), 'No. of rooms/spaces' (1351), 'Clinical use' (Please choose), 'Estates reference' (empty), 'Last refurb' (DD/MM/YYYY field), 'Future plan' (To Be Retained), 'Essential' (checkbox), 'Temporary' (checkbox), 'Lifecycle assess' (checkbox), 'Division' (Please choose), 'Ownership' (Please choose), 'Public transport' (Please choose), 'On-site parking' (checkbox), 'Setting' (Please choose), 'Heated volume' (empty), 'File reference' (empty), and 'Notes' (text area). At the bottom are 'Submit' and 'Cancel' buttons.

### Terrier at Site level: Under Location information (SAMS only)

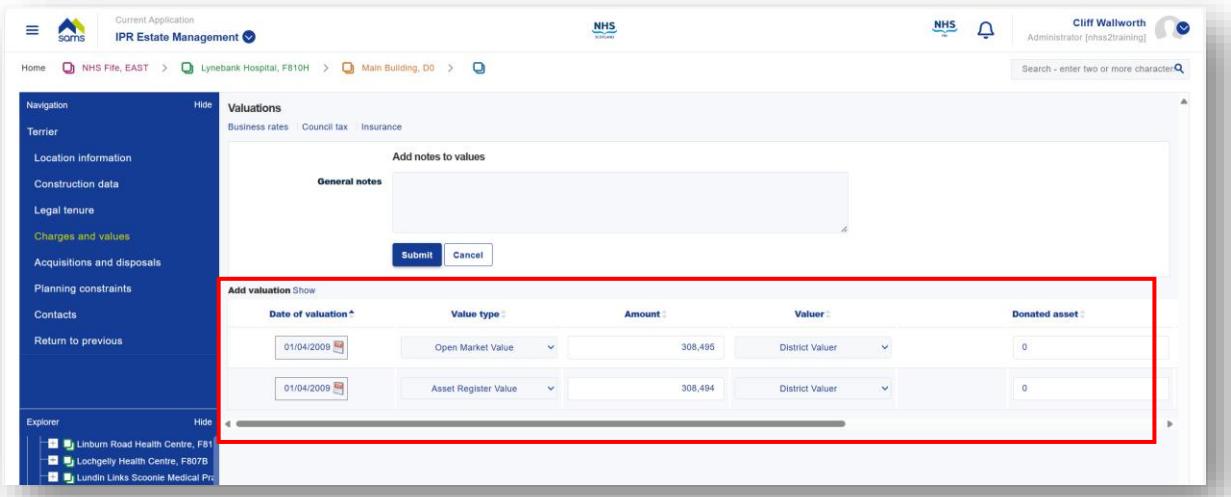
The Leases module changes are label name and lookup list content terminology to align with Scots Law.

#### Note

For both Terrier and Leases modules, the master lookup lists may no longer be edited by users, they are now defined and issued by NHSS centrally. If there is a need to edit or add to the master lookup lists then the subject matter will need to be addressed to NHSS.

## Terrier Valuations

A new feature for classic IPR 3.9 and SAMS. To Access from Terrier go to Charges and values, Valuations.



The screenshot shows the 'Valuations' section of the Terrier application. On the left, a navigation menu includes 'Terrier', 'Charges and values' (which is highlighted in yellow), and 'Acquisitions and disposals'. The main content area is titled 'Valuations' and shows two rows of valuation data. Each row has a red border. The columns are: Date of valuation, Value type, Amount, Valuer, and Donated asset. The first row has a date of 01/04/2009, an Open Market Value of 308,495, a District Valuer, and a Donated asset of 0. The second row has a date of 01/04/2009, an Asset Register Value of 308,494, a District Valuer, and a Donated asset of 0. At the top of the main content area, there is a 'General notes' text input field and 'Submit' and 'Cancel' buttons. The top right corner shows the user 'Cliff Wallworth' and the NHS Scotland logo.

The Valuations now allows multiple historic records, a feature request by NHSS but will be a standardised feature of Terrier to all.

## IPR 3.9 Features moved from within IPR out to HUB

### Reports & Exports

Standard reports have been moved out of IPR, traditionally these are the preformatted reports that were visible under Standard Reports on the left menu of IPR.

All of the Standard reports will be re-written in new technologies. The new technology is a dedicated Reporting Service and is a separate App named Reports & Exports. This new App keeps the heavy weight system queries away from the IPR application, it's a fully dedicated service that offers report design wizards with choices of output file types, PDF DOCX and XLSX. Reports can be queued and scheduled to be delivered to you and your colleague's email inbox 24/7.

To access the Standard Reports, from the HUB click on Reports & Exports

#### **Note**

The Custom reports and Advance Query reports of IPR remain unchanged, accessible in the same way from IPR's left menu.

The new Reports service will serve to access all of the Micad platform Apps in future iterations.

The App is named Reports (**and Exports**) since the service will best accommodate exports of data in mass. For the SAMS implementation, 6 facet survey templates are delivered in either choice of populated or blanks.

### Admin centre (User account management)

User account management has been moved out of IPR's Administrate section to a dedicated Security Service App named User accounts.

To add and edit users and/or set user rights, from the HUB click on the User accounts App.

#### **Note**

For IPR users wishing to have access the file system (to upload files). Filestore access and Filestore alias remains inside IPR under Administrate.

### Audit trail

Audit trail is a common feature to all Micad applications, accordingly, Audit Trail has been moved from the Administrate of IPR to serve all of the App on the Micad platform.

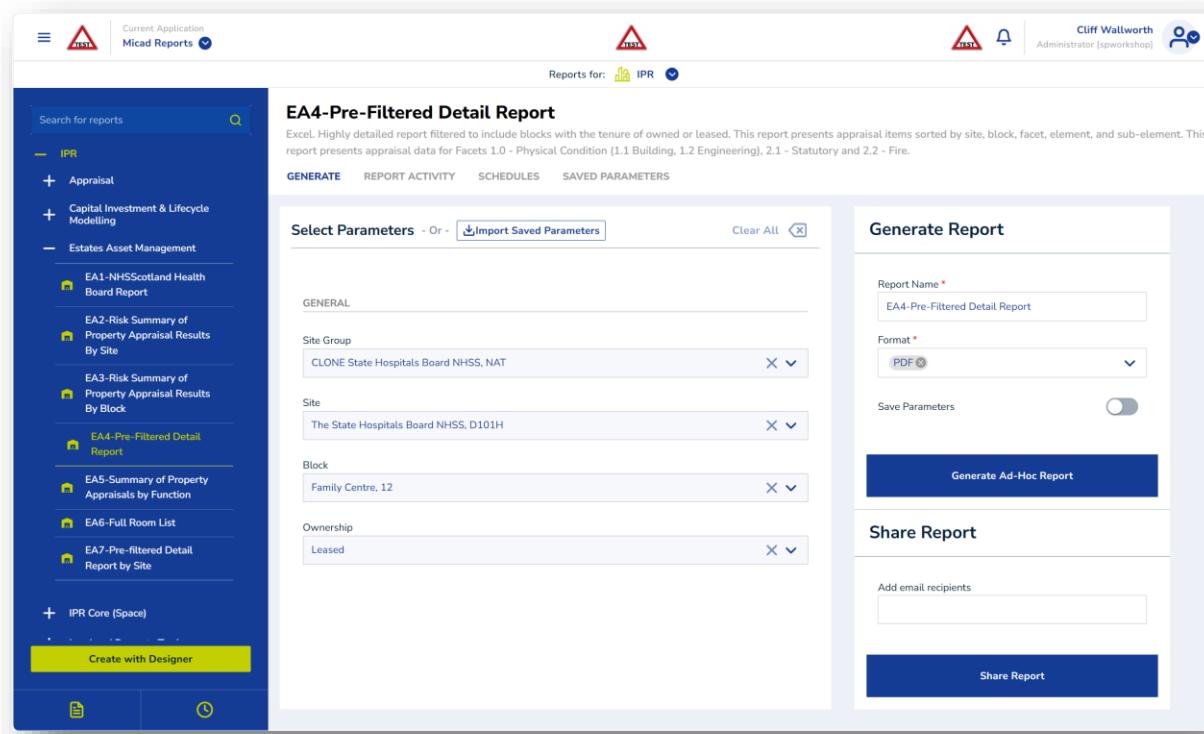
## New Reporting service

Reports is a central platform for accessing data from Micad Applications and or professional modules.

Reports can be used ad-hoc or set to run automatically by way of a scheduler. Users intuitively choose their subject matter description by way of a main keyword search feature. Where data is required by location, a report builder provides a step-by-step process. User's may save, copy and share their report design formats should any further filter refinement be required.

### What's new in Micad Reports

1. New technology many legacy limitations are removed
2. Unified 3<sup>rd</sup> generation UI
3. Unified centralised security 'Single Micad' login the HUB platform
4. Provides comprehensive details for what each report will deliver
5. System load impact is moved away from the application module
6. 24/365 Scheduler wizard
7. Mobile support with responsive design
8. A choice of file outputs XLSX, DOC & PDF
9. Superior and more durable backend infrastructure



The screenshot shows the Micad Reports interface. At the top, there are navigation icons for 'Current Application' (Micad Reports), 'Reports for' (IPR), and a user profile for 'Cliff Wallworth'. The main content area is titled 'EA4-Pre-Filtered Detail Report'. It displays a brief description of the report: 'Excel. Highly detailed report filtered to include blocks with the tenure of owned or leased. This report presents appraisal items sorted by site, block, facet, element, and sub-element. This report presents appraisal data for Facets 1.0 - Physical Condition (1.1 Building, 1.2 Engineering), 2.1 - Statutory and 2.2 - Fire.' Below this, there are four tabs: 'GENERATE', 'REPORT ACTIVITY', 'SCHEDULES', and 'SAVED PARAMETERS'. The 'SAVED PARAMETERS' tab is active. On the left, a sidebar shows a tree view of report categories under 'IPR', including 'Appraisal', 'Capital Investment & Lifecycle Modelling', 'Estates Asset Management', 'EA1-NHSScotland Health Board Report', 'EA2-Risk Summary of Property Appraisal Results By Site', 'EA3-Risk Summary of Property Appraisal Results By Block', 'EA4-Pre-Filtered Detail Report' (which is selected and highlighted in yellow), 'EA5-Summary of Property Appraisals by Function', 'EA6-Full Room List', and 'EA7-Pre-filtered Detail Report by Site'. The 'IPR Core (Space)' category is also listed. At the bottom of the sidebar is a 'Create with Designer' button. The main panel shows 'Select Parameters' with dropdowns for 'Site Group' (CLONE State Hospitals Board NHSS, NAT), 'Site' (The State Hospitals Board NHSS, D101H), 'Block' (Family Centre, 12), and 'Ownership' (Leased). To the right, there are sections for 'Generate Report' (Report Name: EA4-Pre-Filtered Detail Report, Format: PDF) and 'Share Report' (Add email recipients). A large blue button at the bottom right says 'Generate Ad-Hoc Report'.

See the Reports service User Guide for more details

## New Admin centre service

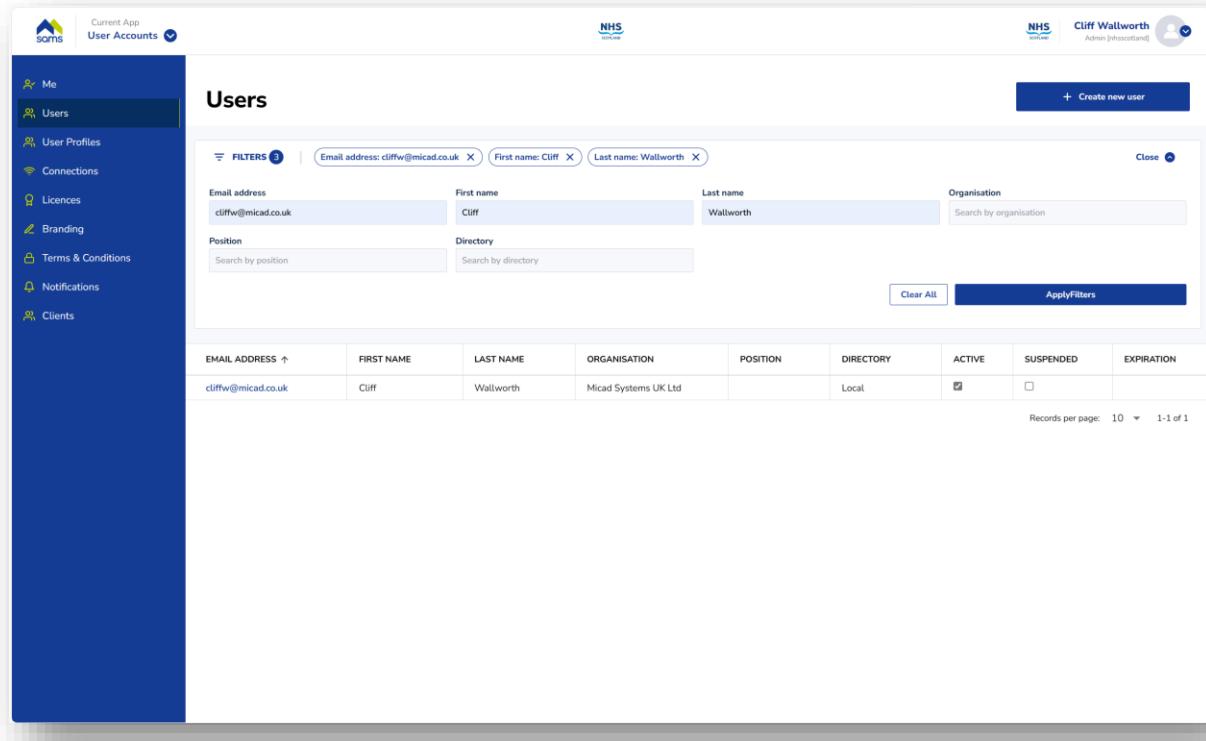
Role base user management is now available for the Micad HUB Platform

Current App		NHS	NHS	
User Accounts		Cliff Wallworth		Admin (In use)
 Me				
 Users				
 User Profiles				
 Connections				
 Licences				
 Branding				
 Terms & Conditions				
 Notifications				
 Clients				
User profiles		+ Create new user profile		
Displaying 25 of 25 users		 FILTERS		Show 
PROFILE NAME	DESCRIPTION	ROLE	APPLICATIONS	
All Applications [Super]		Admin	Accounts, Appraisal, Capital Planning, Fire Incidents/UFAS, IPR, IPRConfig, Leases	
Capital Investment & Lifecycle Modelling [Admin]	Capital Investment & Lifecycle Modelling Admin	Admin	Capital Planning	
Capital Investment & Lifecycle Modelling [Editor]	Capital Investment & Lifecycle Modelling editor	User	Capital Planning	
Capital Investment & Lifecycle Modelling [Viewer]	Capital Investment & Lifecycle Modelling Read-only	Viewer	Capital Planning	
National Profile Accounts User		User	Accounts	
National Profile Accounts Viewer		Viewer	Accounts	
National Profile Appraisal Admin	Users of IPR Appraisal is Admin existing data	Admin	Appraisal	
National Profile Appraisal Editor	Users of IPR Appraisal Edits existing data	User	Appraisal	
National Profile IPR Admin	Users of IPR access all folders, add space records and take-off drawings	Admin	IPR	
National Profile IPR and all modules Admin	All IPR and modules Admin	Admin	Leases, MAC, Portals, Reports, Terrier, Appraisal, Capital Planning, Fire Incidents/UFAS	
National Profile IPR Editor	Access all locations, add space records access only own folders in IPR only	User	IPR	
National Profile IPR, Terrier, Appraisal, Leases Edits	Edits IPR, Terrier, Appraisal, Leases	User	IPR, Terrier, Appraisal, Leases, Reports, Portals, MAC	
National Profile Leases Admin	Users of IPR Leases is Admin existing data	Admin	Leases	
National Profile Leases Editor	Users of IPR Leases Edits existing data	User	Leases	
National Profile Portals Admin	User will manage local Portals Viewers	Admin	Portals	
National Profile Portals Viewer	User will see whats configured for them by a local Portals Admins	Viewer	Portals	
National Profile Terrier Admin	Users of IPR Terrier is Admin existing data	Admin	Terrier	
National Profile Terrier Editor	Users of IPR Terrier Edits existing data	User	Terrier, IPR	

The screenshot shows the SAMS application interface. The top navigation bar includes the SAMS logo, 'Current App User Accounts' (with a dropdown menu), the NHS logo, and a user profile for 'Cliff Wallworth Admin (Health and Social Care)'. The left sidebar has a dark blue background with yellow icons and text for 'Me', 'Users', 'User Profiles', 'Connections', 'Licences', 'Branding', 'Terms & Conditions', 'Notifications', and 'Clients'. The main content area has a white background. It shows a user profile for 'National Profile IPR and all modules Admin'. The profile details include a yellow profile icon, a back arrow, and a 'Delete profile' button. The 'USER PROFILE DETAILS' section contains fields for 'User profile name' (set to 'National Profile IPR and all modules Admin'), 'Description' (set to 'All IPR and modules Admin'), 'Role' (set to 'Admin'), and a 'Applications' section with a list of selected modules: Leases X, MAC X, Portals X, Reports X, Terrier X, Appraisal X, Capital Planning X, Fire Incidents/UFAS X, IPR X, Accounts X, Zetasafe X, and IPRConfig X. At the bottom are 'Cancel' and 'Save profile' buttons.

Users can now be assigned into roles, this process unifies and simplifies the setup process.

The whole new redesign for security service makes user management a much slicker process.



The screenshot shows the 'User Accounts' app interface. The left sidebar has a dark blue background with white icons and text: 'Me', 'Users' (selected), 'User Profiles', 'Connections', 'Licences', 'Branding', 'Terms & Conditions', 'Notifications', and 'Clients'. The main area has a light blue header with the 'NHS Scotland' logo and the user 'Cliff Wallworth Admin [nhs.scot]'. The title 'Users' is at the top, with a 'Create new user' button. Below is a 'FILTERS' section with dropdowns for 'Email address' (cliffw@micad.co.uk), 'First name' (Cliff), 'Last name' (Wallworth), and 'Organisation' (Search by organisation). There are also 'Position' and 'Directory' search fields. Buttons for 'Clear All' and 'ApplyFilters' are at the bottom of the filters. A table below shows one user record:

EMAIL ADDRESS ↑	FIRST NAME	LAST NAME	ORGANISATION	POSITION	DIRECTORY	ACTIVE	SUSPENDED	EXPIRATION
cliffw@micad.co.uk	Cliff	Wallworth	Micad Systems UK Ltd		Local	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

At the bottom right of the table are 'Records per page: 10' and '1-1 of 1'.

To access the IPR user management system, from the HUB click on the User Accounts App.

#### Note

Only system administrators can access the User Accounts App.

The User Accounts App will not show on HUB if you don't have rights.

Check with your system administrator if you wish to have new users added or rights altered.

# IPR Features and fixes

## IPR Release SAMS 3.9.0.19036 features and fixes (09/01/2024)

### 11329 Fixed an issue with SAMS Appraisal module

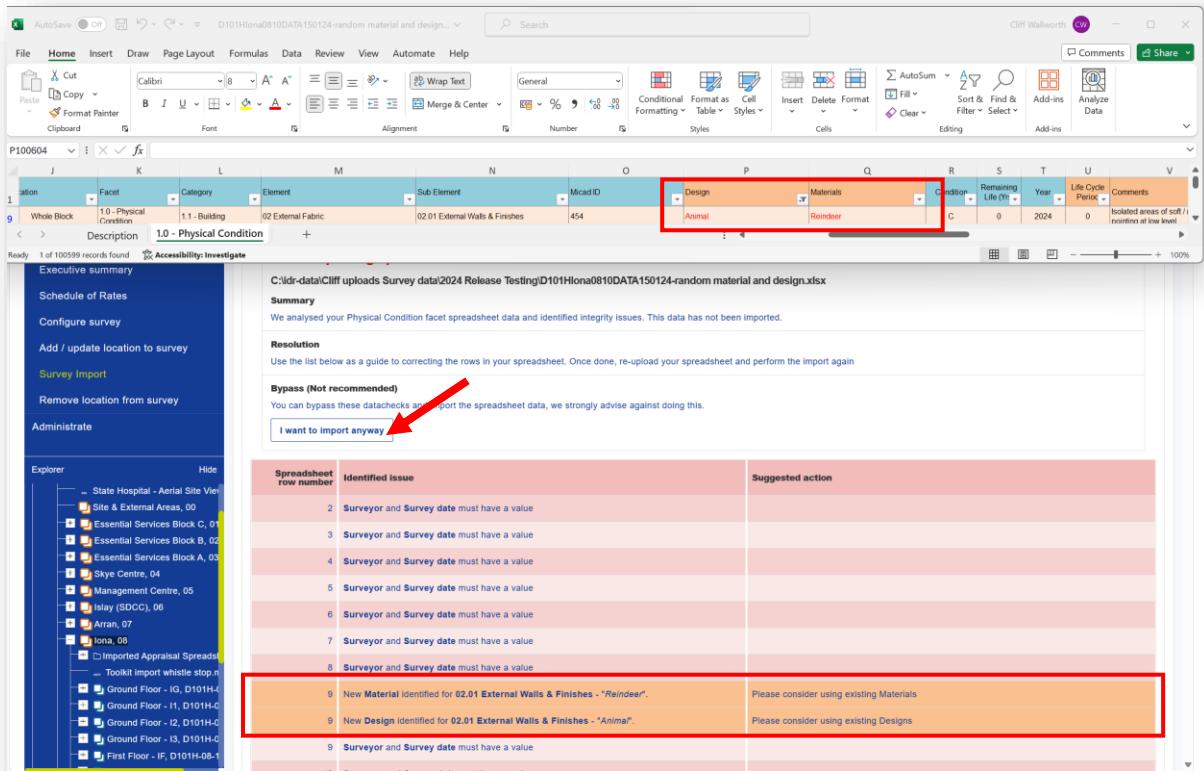
*Left menu that caused error Appraisal query error Variable qsDel undefined*

### 11315 Fixed and issue in Leases Module, Copy lease feature

*Remove deprecated columns removed from stored proc (\_CopyLeaseLicence.sql)*

### 11286 New Feature for SAMS Appraisal spreadsheet importer

*Added advice warnings are listed with Amber text, when importing new materials and designs that are not in the master table. Feature discourages human input error and unwarranted deviation to set standards.*



The screenshot shows a Microsoft Excel spreadsheet titled 'D101Hlon0810DATA150124-random material and design.xlsx'. The spreadsheet contains data for a Physical Condition facet. The columns include: J (Facet), K (Category), L (Element), M (Sub Element), N (Micad ID), O (Design), P (Materials), Q (Creation), R (Remaining Life (Yrs)), S (Year), T (Life Cycle Period), and U (Comments). Row 9 shows data for a 'Whole Block' with '1.0 - Physical Condition' as the description. The 'Design' and 'Materials' columns for this row are highlighted with a red box. The 'Design' cell contains 'Animal' and the 'Materials' cell contains 'Reindeer'. In the 'Resolution' section of the interface, there is a button labeled 'I want to import anyway' with a red arrow pointing to it. The 'Survey Import' section is also highlighted with a red box.

*Custom feature for NHSS importer that tests the data for data inconsistencies. Halts the import process and allow secondary correction and consideration before importing. Tests are carried on Physical Condition and Statutory data only. Failure to meet the rules results in Red. NHSS wish to contain the scope of Design and Material, falling out of scope raises an Amber warning. Design and Material are built in the Appraisal database as data is input, therefore new or empty systems will show this warning.*

*Red = stop and correct your data. Amber = observe, check if you have made typos.*

### 11033 SAMS Appraisal improve page efficiency to mitigate page timeout

*Huge appraisal pages (C. 2500 rows) could cause browser out of memory*

**11119** SAMS, setting Portals user rights from Profiles

*Fixed an issue identified that did not allow the first admin account to access Portals to set up additional users*

## [IPR Release SAMS 3.9.0.20441 features and fixes \(12/04/2024\)](#)

*Version 3.9.0.20441 Date 11/04/2024 11:54:43*

In this release there are fixes and we introduce the two modules, Asbestos and Compliance. These modules have been UI aligned to the IPR 3.9 style. The modules are functionally the same as 3.8. There are some minor changes made to support the new NHS 2023-23 ERIC data definitions (As Issued by NHS England January 2024)

**11597** SAMS Appraisal, finalising a defect as Complete needs to be clearer

*Fixes an issue where it was not obvious that the Completion process required further details that are mandatory, they appear below the dialog box. A feature is added to show the use the mandatory fields.*

**11430** NHSS IPR Terrier Historic Valuations Data/ UI change

*NHSS specific feature request adds the ability to have more than one valuation, this give the ability to keep a historic record.*

**11465** NHSS specific, Appraisal module Remaining life shows zero

*Fixes an issue related to column heading showing from a Department of Health field that had no data when on screen. The issue appeared as if there were no data, when the data is actually there, just not shown*

**11515** SAMS, IPR Forms and Custom reports cause error

*Fixes an issue with Edit custom report raises error*

**11537** Accounts user SSO, provider box allows any garbage text entry

*Removed, this feature is not needed*

**11556** SAMS Configure Survey raises error

*Fixes an issue with configuration and viewing of survey templates*

**11557** SAMS Appraisal, Appraisal Query cant edit an existing query

*Fixes an issue with rights that prevented deletion of fields from an existing report*

**11592** IPR, Custom report cant delete a data field once added

*Fixes an issue with rights that prevented deletion of fields from an existing report*

**11660** SAMS Terrier Copy address site to block and also changes the block location name and code

*Feature request for change to Terrier, copies over the Address between Site and Block. Previously this would change the location name too. This was altered in line with the client request.*

**11712** Asbestos UI Change the dotted lines separation colour

**11744** Department tree, UI Table text colour, UI text and cosmetic image issues

**11747** Left menu, Role does not work/is not read by IPR left menu

**11752** Asbestos Report for 3.9 Report, convert classic Asbestos MA PA to new technology

**11756** NHSS Specific, Switch menu links off when the build is not NHSS

**11758** Security, As a Micad checked user i should see Terrier & Leases in Admin mode

**11759** Security, left menu content consistency for module alignment for levels Site and Region

**11762** Asbestos Module 3.9, UI issue Risk & Events schedule table format is squashed

**11763** Asbestos Dashboard, Action link caused 404, UI issue

**11764** IPR Cosmetic, UI text and background issue

**11765** IPR Cosmetic UI location Status are missing

**11766** Asbestos module UI explorer cosmetics

**11767** Asbestos module, Limbo list delete takes the wrong item

**11770** Asbestos module UI alignment issue

**11774** 2FA MT Security, UI issue entering the code by hand misses first number

**11776** Asbestos Admin (Profile Role) requires default Omnipresent and left menu Asbestos dashboards

**11778** Asbestos module UI text colour alignment issue (Profiles feature)

**11843** Asbestos Module 360 integration issues Asbestos preview missing

**11844** Asbestos Module 360 integration issues Menu colour issue, make it draggable, add scroll bars

**11871** SAMS, UI Popover cosmetics shows background artefacts

**11872** SAMS, UI Header graphics show two conflicting logos

**11873** SAMS User forms Run option shows error

*Fixes an issue where the form would not execute*

**11877** Location UI issue status are not showing

**11879** As-Built UI issue status image unreadable

**11881** Asbestos statistics page causes 404

*Fixes an issue where a report was called from the wrong folder*

**11887** Asbestos module users, shows soft deleted or invalid

*Removes visibility of ex-users or those with no first or last name*

**11959** SAMS specific, switch for ERIC and EMR Left menu sub-content

*Left menu content management for different types of clients. Set by a background switch. IPR can be Healthcare, Further Education, Commercial.*

**12027** SAMS 1.1 UI issue, chart tools requires Fusioncharts XT version

**11986** SAMS NHSS only Exec Summary content import feature

*New feature for NHSS, 6 Facet Executive summary data importer feature. Data must come from the Micad Executive summary template produced by the Micad data template export reports. Data cannot come from technologies that pre-date Micad SAMS*

**12057** SAMS Appraisal Import not importing Surveyor

*Fixes an issue for NHSS SAMS 6 Facet data import would ignore the surveyors name column.*

**12030** IPR 3.9 Release ERIC changes for 2022-23

*We have modified and the NHS ERIC site form to reflect changes visible in the new data definitions. There are more values required 2022-23. Assuming you have these kind of space allocations within the Trust.*

*For **ERIC S02**, there are new extended space status to add to your IPR ERIC, these come from the (S02 section S02\_05 through S02\_32.*

*To be added by an Admin user of IPR. At room level, go to Tools, Property information, ERIC Space Status. In the custom property data group named 2020 ERIC, you will see a field named ERIC Space Status. Its content is comma separated you, can edit the string add the new Status to the end of the existing entries.*



The screenshot shows a 'Property information' interface. At the top, there is a 'Selected group' dropdown set to '2020 ERIC Space Status'. Below it is a 'Manage fields & groups' section. Under 'Fields in current group', there is a list with 'ERIC Space Status' selected, showing its value: 'Clinical Space - Private Patient S02\_05,Clinical Space - Pathology Chemical S02\_06,Clinical Space - Path'. At the bottom of this section are 'Submit' and 'Cancel' buttons. At the very bottom of the interface, there are 'Guest view' and 'Publisher view' links.

*Use a text editor or create the extended list in CSV format. One long string is used, a comma between and no space between each is required. Leave the original string unchanged, just add the new values as needed at the end. Click submit to save the field look values.*

- *Non-Clinical Space - 111 Contact Centre S02\_19*
- *Non-Clinical Space - 999 Contact Centre S02\_20*
- *Non-Clinical Space - PTS Contact Centre S02\_21*
- *Non-Clinical Space - Hub (make ready station) S02\_22*

- *Non-Clinical Space - Spoke S02\_23*
- *Non-Clinical Space - Ambulance Station S02\_24*
- *Non-Clinical Space - Patient Transport Services S02\_25*
- *Non-Clinical Space - Training S02\_26*
- *Non-Clinical Space - Corporate S02\_27*
- *Non-Clinical Space - Fleet Workshop S02\_28*
- *Non-Clinical Space - Hazardous Area Response Team (HART) S02\_29*
- *Non-Clinical Space - Masts S02\_30*
- *Non-Clinical Space - Logistics Store S02\_31*
- *Non-Clinical Space - Other - Areas NOT included in S02\_19 to S02\_31 S02\_32*

**Note.** *It is essential to use the format specified here so that charts can provide both data sets from one single field. Clinical/Non-Clinical is derived from here as well as the space status. Test your results by changing some data and then check the ERIC Site charts and legend are showing correctly.*

*If you have any questions or need assistance please contact Micad support.*

#### **ERIC S10 Car Parks**

*Use the Terrier at Site level to allocate your Site carparks, in the format that can be made available for export for ERIC. You can define your own types and space definitions.*

##### **S10 Space types:**

- S10\_03 Designated disabled
- S10\_03 Designated disabled (Leased In)
- S10\_04 Electric vehicle charging points
- S10\_04 Electric vehicle charging points (Leased In)
- Residential Parking Space

##### **S10 Carpark Types:**

- Multi-storey car park
- Open car park
- Temporary car park
- Residential car park

*If the ERIC S10 codes change by name or code, you can edit and update the master definitions in the terrier.*

*To create Carparks in Terrier, at Site level go to Terrier, Location information, External spaces, Add carparking facilities.*

*Once you have created a Carpark, to add spaces, Click Edit. Click Add spaces, you can add individual space type counts. To define specifically in line with ERIC naming conventions, use the Edit Parking type to define the names to use during lookups.*

Once complete the ERIC Site form will show a table breakdown and totals for the site. Use the Export to Excel to extract the data and manipulate if needed.

Car parking										
<a href="#">Export to Excel</a>										
Site car parks	Type	Responsibility	Total spaces	Pay & Display	Reserved	S10_03 Designated disabled	S10_03 Designated disabled Staff	S10_03 Designated disabled Visitor	S10_04 Electric vehicle charging	Staff
CP2001 - ED Drop-off Canopy - (A&E)	Open car park 4 (Drop Off)	AGHS Security	4	0	0	0	0	0	4	0
CP2002 - ED Ambulances Only - (A&E)	Open car park 6 (Hospital Transport)	AGHS Security	6	0	0	0	0	0	6	0
CP2003 - Antenatal & Children's OPD - Building 22	18 (P&D) 2 (Res) 2 (Blue) 2 (Pick Up)	AGHS Security	24	18	2	0	0	2	2	0
CP2004 - Main Entrance - Priority Staff Barriered	32 (Staff)	AGHS Security	32	0	0	0	0	0	0	32
CP2005 - Central Facilities - (Redundant)	Open car park	AGHS Security	17	0	0	1	0	0	1	15
CP2006 - Central Stores - Building 9	Residential	AGHS Security	9	0	0	0	0	0	0	9
CP2007 - Child Development - Building 15	Open car park	AGHS Security	15	13	0	2	0	0	0	0
CP2008 - Mobility Services - Building 16	Open car park	AGHS Security	30	23	0	7	0	0	0	0
CP2009 - Day Hospital - Zone D	Open car park	AGHS Security	20	0	0	3	2	0	0	15
CP2010 - Day Nursery - Building 10	Open car park	AGHS Security	5	0	0	0	0	0	5	0
CP2011 - Diabetes Centre - Building 17	Open car park	AGHS Security	28	18	0	2	0	0	0	8
CP2012 - Car Park P2 - Staff Only	Temporary car park	AGHS Security	47	45	0	2	0	0	0	0
CP2013 - Labour Ward Staff and Drop-Off - Building	Open car park	AGHS Security	12	0	0	0	0	0	0	12
CP2014 - Beach Car Park - Staff	Open car park drop off	AGHS Security	7	0	4	0	0	0	0	3
CP2015 - Labour Admissions - Building 1	Open car park	AGHS Security	20	6	0	0	0	0	0	14
CP2016 - Laundry Courtyard - Buildings 3,4,5,6,7	Open car park	AGHS Security	17	0	3	0	0	0	0	14
CP2017 - Main Entrance - Drop Off Only	Open car park	AGHS Security	17	0	0	4	0	0	1	12
CP2018 - Car Park P1 - (Barriered) Visitors	Open car park visitor and staff	AGHS Security	157	157	0	0	0	0	0	0
CP2019 - Health & Wellbeing - Building 11	Open car park	AGHS Security	18	0	6	0	0	0	0	12
CP2020 - Outpatients Entrance - Zone A1	Open car park	AGHS Security	50	34	0	16	0	0	0	0
CP2021 - Rear of Social Services - Building 19	Open car park	AGHS Security	20	0	0	0	0	0	0	20
CP2022 - Rear Perimeter Road - Staff	Open car park	AGHS Security	44	0	0	0	0	0	0	44
CP2023 - Side of Works Dept.	Open car park	AGHS Security	8	0	0	0	0	0	0	8
CP2024 - Car Park P3 (Barriered) - Visitors & Staff	Multi-storey visitor	NCP	616	117	0	0	0	0	0	499
CP2025 - Estates Maintenance - Building 8	Open car park	AGHS Security	12	0	0	0	0	0	0	12
CP2026 - AAU - NHS Staff Only	Open car park	AGHS Security	4	0	0	0	0	0	4	0
<b>Total</b>			<b>1239</b>	<b>431</b>	<b>15</b>	<b>37</b>	<b>2</b>	<b>2</b>	<b>23</b>	<b>729</b>

The example shows how space types can be named to include the ERIC S10 codes.

Reports Release, SAMS Reports services features and fixes API & App (09/01/2024)  
App Version 1.0.19052 Date 17/01/2024 15:06:46, API Version 1.0.19051 Date 09/01/2024 14:30:24

This release is for the following bespoke specifications for NHSS

**11030** SAMS bespoke report NHSS-02, create variants

*New Reports, Create 2 new reports that can run separately by site and block requested by NHSS*

**11148** SAMS specific fix for report NHSS-01

*Nomenclature Building not being picked up in the middle of text field*

*Change 'Tenure' parameter title to 'Ownership' where applicable*

*Fix ownership parameter query was not correct on report NHS-04:*

*Appraisal Exporter fixes*

*Appraisal Exporter - Quantity column changed to field from query, not Excel formula.*

*Defectlist table removed from main query - no longer needed.*

*Change column heading "Ownership" to "Agreement Type" on report NHS-06*

*Restrict NHS report NHSS- 8 & 10 to XLSX*

**11097** Create SAMS Appraisal Executive Summary new template

*Create a method to export Exec summary data template*

**10949** Add support for retrying failed, interrupted and stuck reports

*Added report level field - appraisal reports to be at board level only*

*Added default parameters - Board level parameters: Site-Room, NHSS Region level parameters: Board-Room, National Level parameters: NHSS Region-Room*

*NHSS Reports parameter label change - Changed all NHSS Report's parameter label Building to Block*

**NHSS specific new Report naming scheme based on Coded prefixes.**

*Updating NHSS report titles NHS-1 to NHS-7. NHSS Customisation request*

**11171** Report NHSS-01 feedback on cosmetic changes requested by NHSS

**11293** Added Site group parameter/updating naming convention for NHSS

**11341** Added departmental reports to the reporting service - Board level only

**11342** Review FCI calculation on NHS-10 report. Updated to Backlog Cost/Lifecycle Cost

*Fixed and issue to support for blank Region and RegionNHSS params in tabular reports*

**11363** Fixed and issue in Lease reports - adding NHSS Region parameter

**11364** Fixed and issue Updated Leases by Expiry (inc Break Date) report query to use new stored procedure

**11354** New report show a list of user profiles and which system they are used by

*Bespoke specification for NHSS it is listed under Security named **Profile List***

**11172** New report to run from National Top level

*Bespoke specification for NHSS, new report named **NR1 National Risk Summary of Property Appraisal Results By Board***

**10700** Fixed and issue where Leases Report - IFRS 16 would not show data

**11224** New feature template Export report parameter defaults

*Bespoke for NHSS, survey export process offers a default XLSX file name that includes the comprises Site code, Block name and Block code (DATA or BLANK), date (DDMMYY)*

Reports Release, SAMS Reports services features and fixes API & App (09/02/2024)

*App Version 1.0.19191 Date 31/01/2024 15:55:15, API Version 1.0.19386 API Date 07/02/2024 15:26:54*

This release contains bespoke report changes to the specifications of NHSS

**11368** New Security Report - User Clients (Micad Internal use only)

**11390** Security Report - Users Profile and Roles update. Added User Profile-filter.

**11480** SAMS Report wording change in description, EA2-Risk Summary of Property Appraisal Results By Site

**11479** SAMS Report wording change in description for, EA3-Risk Summary of Property Appraisal Results By Block

**11485** SAMS Report formula change for EA3 (bug fix)

**11364** Update to report name only (changed from 'Profile List' to 'Users Profiles List')

**11498** Ensure aggregates are working for report designer (Micad internal use)

**11566** SAMS report number EA7 to be removed from the NHSS systems completely

Reports Release, SAMS Reports services features and fixes API & App (12/04/2024)

App version - 1.0.20315, API Version - 1.0.20459

**11398** IPR Asbestos Items by Risk report

*New modernised version for IPR 3.9 runs via Reporting service and scheduler*

**11421** IPR Asbestos Schedule of Findings report

*New modernised version for IPR 3.9 runs via Reporting service and scheduler*

**11441** IPR Asbestos Re-Inspection Report

*New modernised version for IPR 3.9 runs via Reporting service and scheduler*

**11447** IPR Asbestos Regulation 4 Report

*New modernised version for IPR 3.9 runs via Reporting service and scheduler*

**11472** New Security report: Portals use by user & module

*New report used to monitor Portals use and last access date. Shows each Portal tile (topic) and the date of last access, also shows if users have ever accessed at all.*

**11477** New security Report - 'User clients'

**11576** Update to Users report (Added new boolean parameter for user to specify include/exclude Micad Users)

**11577** Update to Security report - Users Profiles & Roles report

**11579** Update to Security report - Users Profiles List report

**11580** Update to Security report - User Clients (Micad Only) report

**11595** IPR Asbestos Items with Re-Inspections

*New modernised version for IPR 3.9 runs via Reporting service and scheduler*

**11670** Compliance By Location

*New modernised version for IPR 3.9 runs via Reporting service and scheduler*

**11671** Compliance By Element

*New modernised version for IPR 3.9 runs via Reporting service and scheduler*

**11752** SAMS & 3.9 Report, Asbestos MA PA fix to photos not showing

**11810** SAMS only EA5 Report change required (included Unreported costs)

**11817** SAMS only EA1 report requires SQL change (to included Unreported costs)

**11670** New Compliancy by Location report

*New modernised version for IPR 3.9 runs via Reporting service and scheduler*

**11731** SAMS only, new report NR2 National Level Report (for FR D 63)

*This release is phased delivery for huge report, will remain working progress over coming updates*

**11859** Report Designer on National/Region level

*Users should not be able to create custom reports at National and Region level, only board level.*

**11974** SAMS EA1 Report minor calculations and some cosmetic fixes for NHSS

**12032** New SAMS TR1 report changes due since we have included multiple valuations in Terrier

*New report (cosmetically designed for NHSS, should benefit all clients) to show Terrier Valuations data where there are multiple and historic valuations*

**12044** SAMS NHSS Users report feature request

*NHSS bespoke specific report requires Board columns*

**11511** SAMS New UFAS1 report for national, regional and board output

*NHSS bespoke specific report used to export Fire incidents data out to Excel*

*To access this new UFAS1 report, choose the Portals option from the reporting service*

Note this document will no longer include Reports release notes

Release notes for the whole product suite are available [here](#).

## IPR Release 3.9.0. features and fixes (02/09/2024)

This release is for Micad internal testing only.

### 13015 IPR 3.9 Appraisal classic view switch

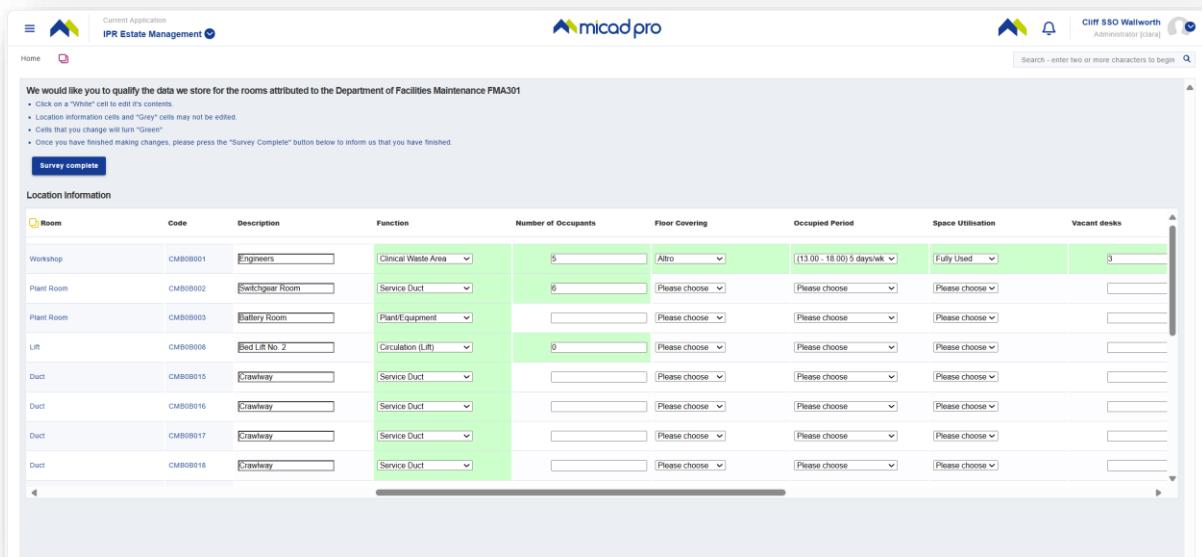
*Background configuration switch set by Micad, shows Appraisal module in SAMS format or Classic mode*

### 13222 SAMS, Appraisal module Statutory compliance import issue

*Fix for an importer issue the Statutory compliance facet of SAMS NHSS rank scheme*

### 11519 New IPR + SAMS feature to be modernise IPR Client query

*The Client Quey tool has redesigned IPR 3.9. You can access this feature as an IPR Administrator. Use this tool to design surveys that can be sent to your department heads to gather local insight on their occupancy data.*



Room	Code	Description	Function	Number of Occupants	Floor Covering	Occupied Period	Space Utilisation	Vacant desks
Workshop	CMB08001	Engineers	Clinical Waste Area	5	Alto	(13.00 - 18.00) 5 days/week	Fully Used	3
Plant Room	CMB08002	Switchgear Room	Service Duct	6	Please choose	Please choose	Please choose	
Plant Room	CMB08003	Battery Room	Plant/Equipment		Please choose	Please choose	Please choose	
Lift	CMB08006	Bed Lift No. 2	Circulation (Lift)	0	Please choose	Please choose	Please choose	
Duct	CMB08015	Crawlspace	Service Duct		Please choose	Please choose	Please choose	
Duct	CMB08016	Crawlspace	Service Duct		Please choose	Please choose	Please choose	
Duct	CMB08017	Crawlspace	Service Duct		Please choose	Please choose	Please choose	
Duct	CMB08018	Crawlspace	Service Duct		Please choose	Please choose	Please choose	

*For the recipients, the updated UI is more intuitive, with its in-cell edit controls. These save the data changes immediately and users can choose to fill out their responses piece meal if needed. The data table is cleaner showing each edit. The top row heading remains fixed above the cell content.*

*For the Space manager, we have made it easier to access the recipient content, links, names and email addresses.*



Client name	Email	Department	Date sent	Completed
SSO Wallworth,Cliff	cliffwallworth@micad.co.uk	Corporate Directorate COD102/Facilities FAC202/Facilities Maintenance FMA301	2/9/2024	Completed - 15 Client changes

You can design your surveys and export the table of users and their links. Use this to create a Word, mail merge if your communications require detailed supporting guidance attachments.

Department	% Share	Area Occupied	Occupied Room NUA	Description	Function	Number of Occupants	Floor Covering	Occupied Period	Space Utilisation	Vacant desks
CC0102\Facilities FAC020\Facilities Maintenance FMA301	100	67.93	67.93	Engineers	Workshop	5	Alto	24hrs	(13:00 - 18:00) 5 days/wk	✓ Accept X Reject
CC0102\Facilities FAC020\Facilities Maintenance FMA301	100	20.87	20.87	Switchgear Room	Plant Room	6	Alto	24hrs	✓ Accept X Reject	✓ Accept X Reject
CC0102\Facilities FAC020\Facilities Maintenance FMA301	100	6.65	6.65	Battery Room	Plant Room	0	Alto	24hrs	✓ Accept X Reject	✓ Accept X Reject
CC0102\Facilities FAC020\Facilities Maintenance FMA301	0	0	6.69	Bed Lift No. 2	Lift	0	Alto	24hrs	✓ Accept X Reject	✓ Accept X Reject

The new UI on the Space manager's data QA is clean and simplified

### Feature test case

A hypothetical test case for this feature would be a space manager sending an annual occupancy survey by email to department heads. The success of survey relies upon the recipients being able to fill out an electronic questionnaire with relative ease, the value to the occupant is exposure to their own records. Together their engagement improves data quality through collaboration, and its free crowdsourced data. The space manager can vet the returned data and choose to accept or reject the free feedback. The data sent back does not go directly into the live system until you qualify it.

If you want to try this feature, you'll need access to IPR as an admin and to have a second IPR account that simulates a lower non-admin user. You can review the feature and its concepts with this 3 part test plan. Once you have established the process, the survey can scaled up to meet the organisation's needs.

### Test plan step 1

IPR Admin user (Space manager role)

1. Allocates users to a department – Via Administrate > IPR user settings > Edit a user > set a Department
2. Creates a space occupancy survey - Via Administrate > Client query > Add Fields
3. Add new client to query – Pick your Client name recipients from the users list
4. Send the email

### Test plan step 2

IPR user (Space occupier or departmental contacts role)

1. Receives the email and clicks the link offered for the survey
2. Logs in as the IPR user (the recipient) and the survey page shows automatically  
OR the user can click a link that appears in the left Menu of IPR (only when a survey is granted to them) Left menu > Space use survey.

3. Recipient fills out the survey sheet, this can be done piecemeal but the system records each change. Instructions are visible at the top of the survey page.
4. Each change is acknowledged when recorded by changing colour to Green
5. Where there's physical checks needed, the survey may take days or weeks to be refined. Floor plans are offered if they are available. Users can use tools offered to review a department's total allocation per floor or check where a specific room is on the plan.
6. When the survey is completed, user can press a button - Survey complete
7. User can return to the data and make more edits if needed via the link from the Email

### Test plan step 3

IPR Admin user (Space manager role)

1. Logs in and goes to Administrator > Client query
2. Checks the Dates and Completed status from the users
3. Those marked complete can now be evaluated for value
4. Click the Complete link
5. Review the data sent back from the departmental contacts, for each cell you can accept or reject.
6. The Accepted content is copied into your live IPR spatial meta data.

**12806** IPR 3.9 client query add email address to the user name lists as well

**12808** IPR 3.9 Client query, User query feature, add 3 columns and an export to excel button

**12978** IPR 3.9 Client query, to show logical Department structure

**13204** IPR 3.9 Client query recipient audit page needs sticky header

**12209** Micad 360 walkthrough photo linking, icon issue

**12641** SAMS 1.2 NHSS SAMS Block Data form FR16, FR102

*New feature for SAMS, Introduction of a form to summarise and access NHSS specific block data*

**12667** IPR 3.9 Filestore recursive publishing creates Unhandled error

**12867** 3.9 Departmental occupancy table formatting and row counts

*UI Improvements for the user. Better presentation.*

**12051** IPR departmentaloccupation.asp table Icons and text alignment issues

*UI improvements to this overall feature*

**13169** IPR Map menu needs SAMS block data link (Part of NHSS SAMS solution FR16, FR102)

*New feature for SAMS, Introduction of a form to summarise and access NHSS specific block data from the Map pin menu*

**11005** SAMS label changes on reporting service

**11785** Asbestos Module 360 integration issues

*Improved UI 360 icon integration*

**11842** Asbestos Module 360 integration issues

*Icon for marker does not display correct*

**12067** Hub welcome to SAMS Support button/feature

**12084** Accounts [Alpha] User promoted to login again for Capital planning

**12105** IPR [MicadPro] Balance IPR menu colours

**12158** IPR [MicadPro] UI Align the Pie chart labels and topics

**12412** SAMS 1.2 NHSS SAMS Room Data form FR16

*1 of 3 New room data collection tool for SAMS specific data set. Uses NHSS space data and heated volume logic as well as providing gap analysis checks*

**12442** SAMS Edit defect is not allowing save

**12566** Uploading files to Leases module error

*Fixed an issue where files would not upload specifically while in Leases module*

**12619** Location Resort feature causes Numeric error message

**12633** HUB is blocking direct URL pass through

**12777** IPR 3.9 Departmental Occupancy has lost Drawing Hatch features

**12787** IPR 3.9 Custom report result table sort issue

**12918** ERIC and SAMS Department occupancy Unassigned Area Click through shows the wrong data

*Fixed a legacy 3.8 issue where the charts filter ignored the Uncheck clickthrough.*

**12938** IPR 3.9 Asbestos module UI issues white on white cosmetic

**13022** IPR 3.9 Custom reports in cell edits on Boolean enters NO, instead of 0

*Fixes an issue that caused incorrect value to be shown*

**13028** Department occupancy page size and break scrolling features no longer working

*Improvement made to Department occupancy data interaction*

**13164** Custom Field Explorer results, displaying bogus data

**11963** Asbestos Survey Types [name] field allows a value > than 20 characters to be submitted.

**11966** Add new contractor popover has incorrect label

**11967** Add new consultancy popover has incorrect label

**11968** Add new status popover has incorrect textarea

**12050** IPR Details pages for documents all need common cell alignment

**12090** IPR About page Release notes target change

**12152** ERIC site car park table re-size with ellipsis and tool tips

**12293** IPR 3.9 Compliance User matrix, user can not be Unchecked from Admin mode

**12360** UI align styles of Application Chooser and Right User Menu with Hub

**12423** Update projects headers to use location header for micadpro/sams compatibility

**12446** Missed UI alignment of IPR explorer tree structure

**12448** IPR3.9 Apply New mechanism to allow Fusion Charts licence to be updated without requiring a container build

**12450** User activity report - Invalid date input detected

**12451** IPR 3.9 Departmental Occupancy page shows no results at room level.

**12515** Custom property search page issue

**12587** IPR Application switch does nothing on first click

**12592** Latest Metro style applied to Drawing Option sidebar

**12605** IPR 3.9 Drawing graphic reports right menu has lost its style

**12631** ERIC Room and Floor forms display Oops something went wrong error upon submit

**12640** SAMS 1.2 NHSS SAMS Floor Data form FR16

*Introduction of new data review forms specific to SAMS*

**12722** IPR 3.9 Custom property search parameter is causing error (Invalid numeric input)

**12747** IPR 3.9, Compliance, new feature - add export to excel on My compliance documents table

*Feature request from client*

**12776** IPR 3.9 custom reports mass update shows invalid numeric

**12778** IPR 3.9, Micad Pro is showing unnecessary SAMS Admin Options

**12789** SAMS 3.9 Appraisal Left menu has two incorrect links

**12826** IPR 3.9 Search does not work on Leases agreements page

*Legacy issue fixed where search would not work on this page*

**12924** Micad Searchable dropdown control does not work in a popover

**12669** IPR 3.9 Filestore sub-node highlight is white on white

**12679** IPR 3.9 Departmental hierarchy Tree view is too compressed

**12941** IPR 3.9 Departmental Occupancy, feature added to freeze the top row while scrolling

*Feature request from client*

**12765** IPR 3.9 search by custom property fix cosmetic issues

<END>