micad fm

Release notes

Version 3.2.0

10/09/2024

Document Version 1.0

This document outlines changes, developments and bug fixes that have been applied to the Micad FM Helpdesk product since its last feature release v3.2.0

Latest release details of the software:
Version = v3.2.0
Date = 10/09/2024

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Major Security & Design Changes - FM

All parts of Micad FM now utilises Micads Multitenant Central Security. Upon opening your Micad FM URL you are presented with a new login page which can be customised as per the branding section of this document below.

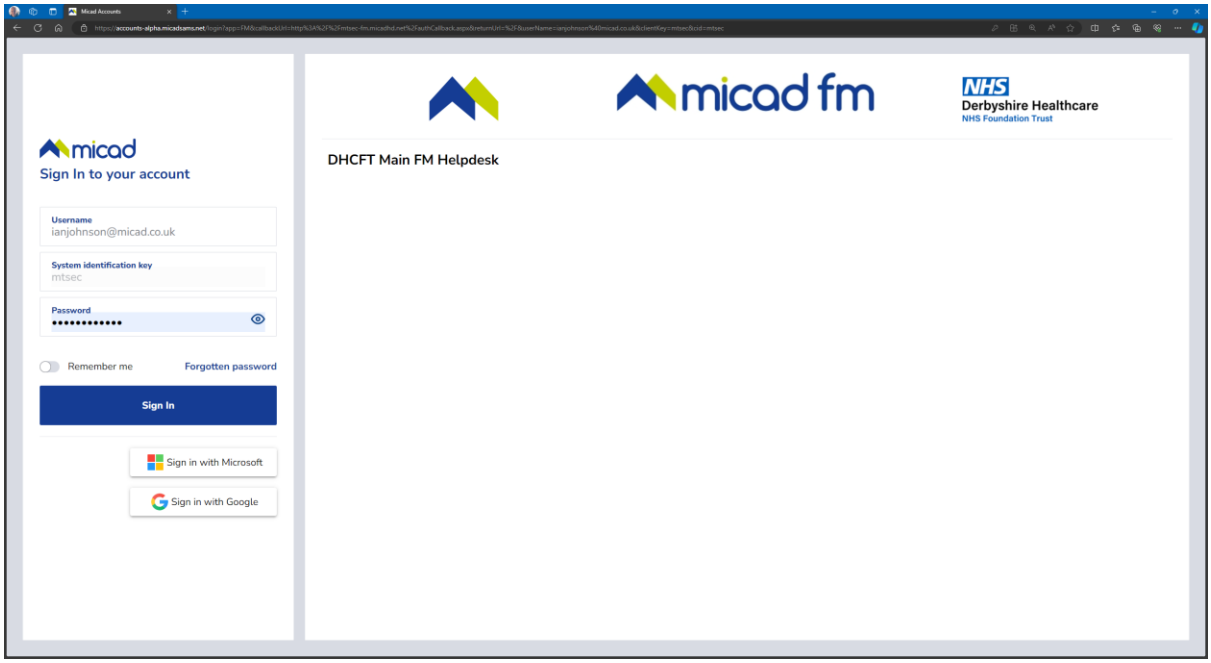

Figure 1: New FM Login Page

Once logged into FM you will notice the banner across the top is now being powered by central security along with new icons for the main modules.

Figure 2: New FM Application Header

From here you can access your own details and logout of the software

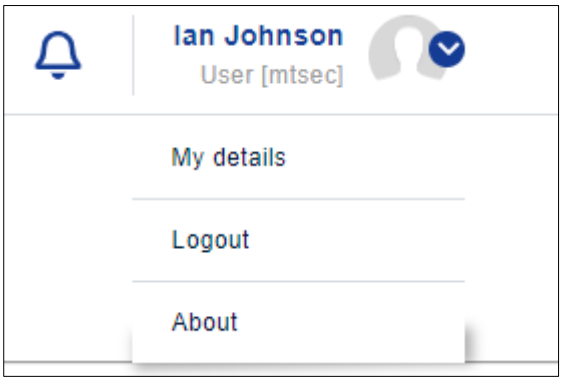

Figure 3: New FM Application Header

When navigating to Administrate -> System Users you will still be presented with this page

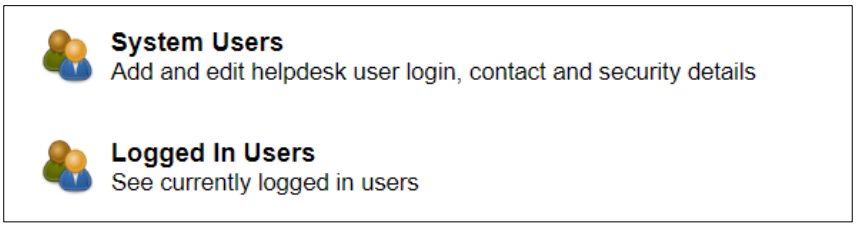

Figure 4: FM System Users Page

The system users' section has been styled to match the other Micad products.

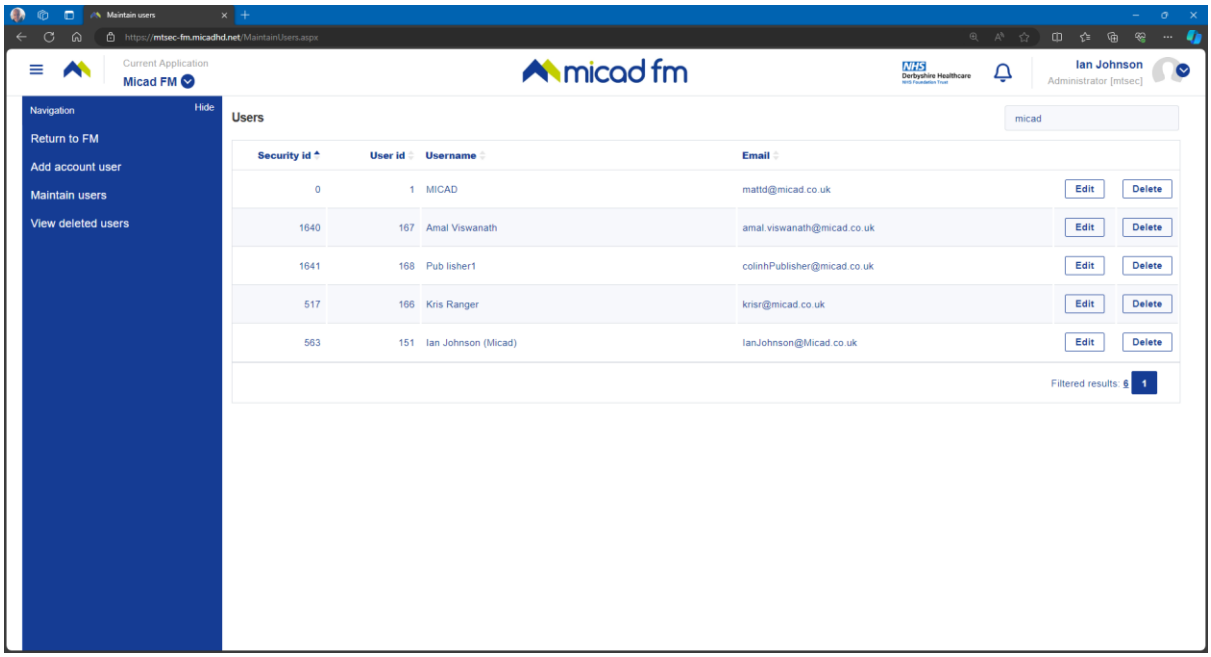

Figure 5: New FM System Users Page

Clicking on a user will take you to the specific FM settings you are used to seeing in the existing versions of the software albeit the pages are now in the new user interface and permissions are linked to the new central accounts. See below nothing has changed in terms of the options available for each user.

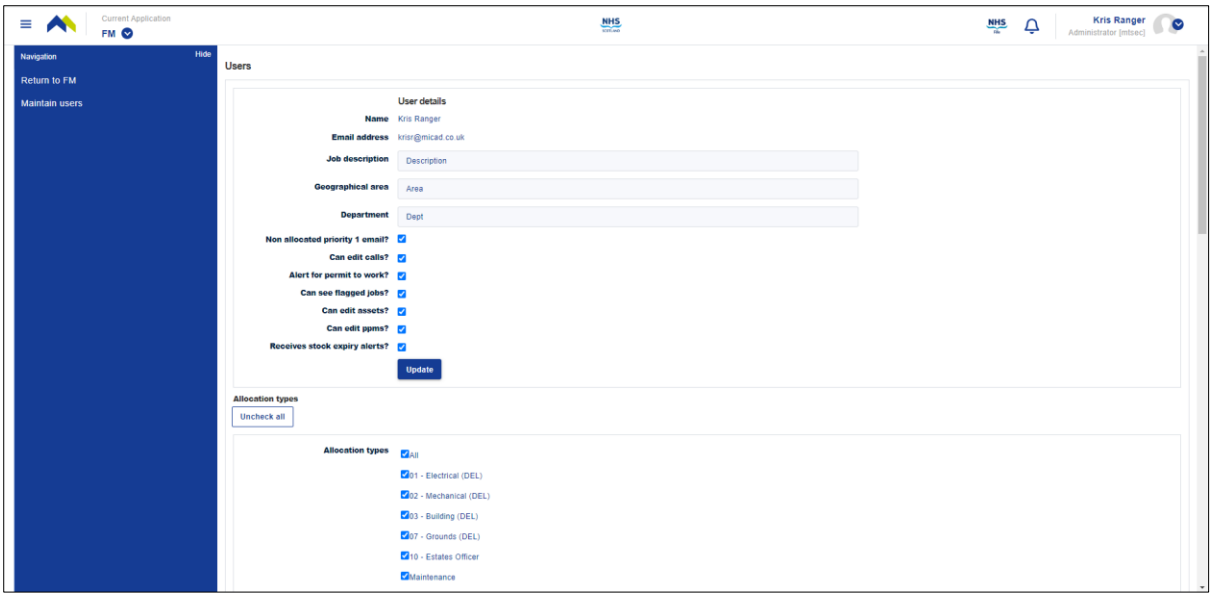

Figure 6: New FM System User Details

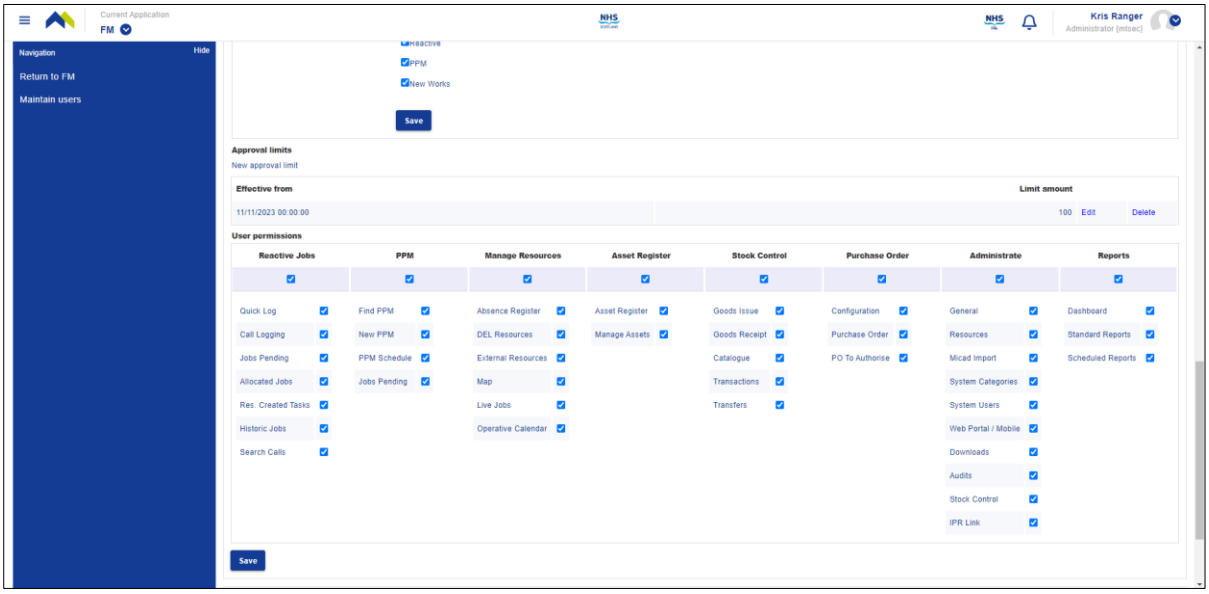

Figure 7: New FM System User Details cont.

Existing Micad FM Users

Before updating to FM v3.2.0 you will need to ensure that all existing FM Users have a valid email address in this field of the current version of the software you are using.

Name	Ian Johnson (Micad)
Login Id	Ian
New Login Password	
Confirm New Password	
Tel. Nr.	
Mobile Nr.	
Email	ianjohnson@micad.co.uk
Job Desc.	
Geog. Area	
Department	

Figure 8: Existing Micad FM User Email Address

The process of upgrading to v3.2.0 for FM Users is as follows:

- Ensure all FM users have a valid email address
- Micad will compare to see if the email address already exists in the existing version of Micad Central Security being used by the IPR and Micad FM Mobile App.
- If the email address exists, the FM User will get matched to the existing account that already exists.
- The user will then login to FM via their email address and the password they use to login to IPR 3.8 and/or the FM Mobile App
- If the user does not exist in Micad Central Security for IPR, we will create them an account and give permissions to the FM application. These users will then login to FM with their email address and a default password which will be communicated to you before the upgrade.
- These users can then reset their password via the forgotten password option on the login page.

New Micad FM Users

Once on FM v3.2.0 to create a new FM user follow the steps below:

- Navigate to Administrate -> System Users -> System Users
- From the menu on the left click on “Add account user”

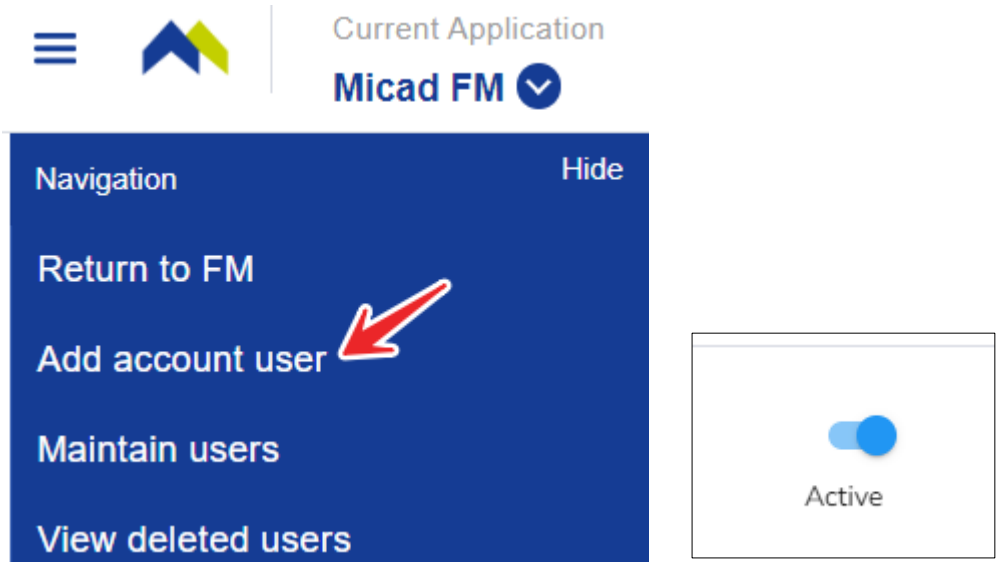

Figure 9: Link to Add Account

- This will take you into the new account’s software. Complete the details on the form and click Next making sure you mark them as active

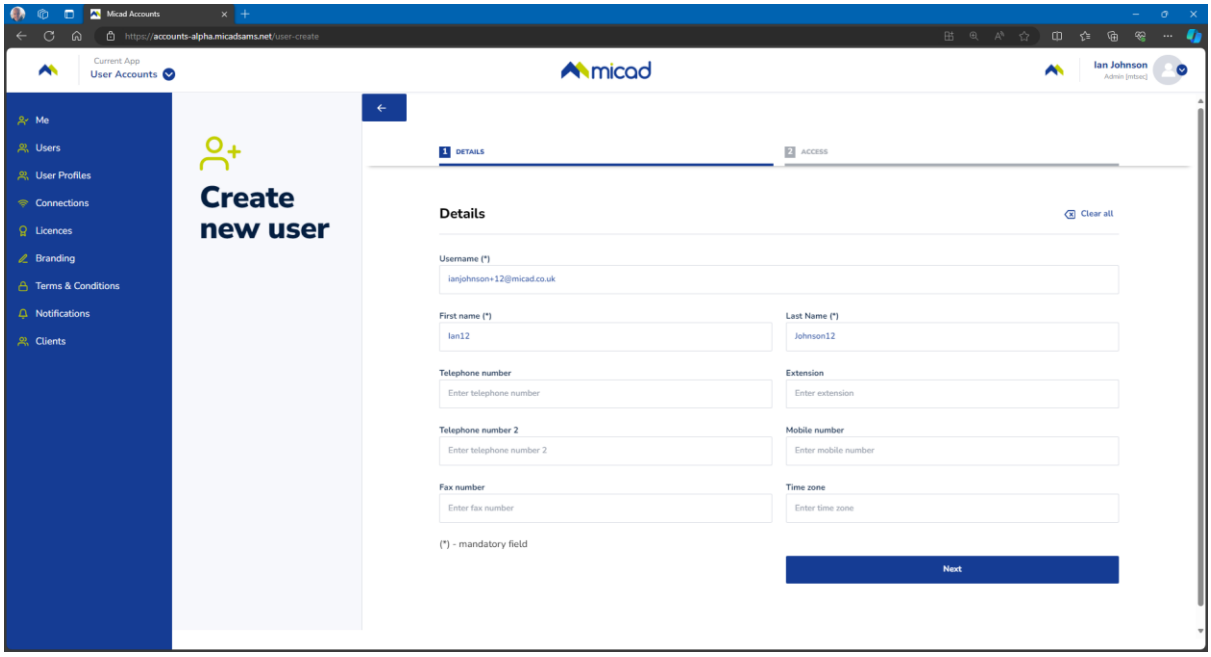

Figure 10: Creating New FM System User Details

As well as clicking Active, complete any of the supplementary information at the top and scroll down to App roles. Click on Micad FM and choose the access required. (FM Administrator can create other FM users in accounts).

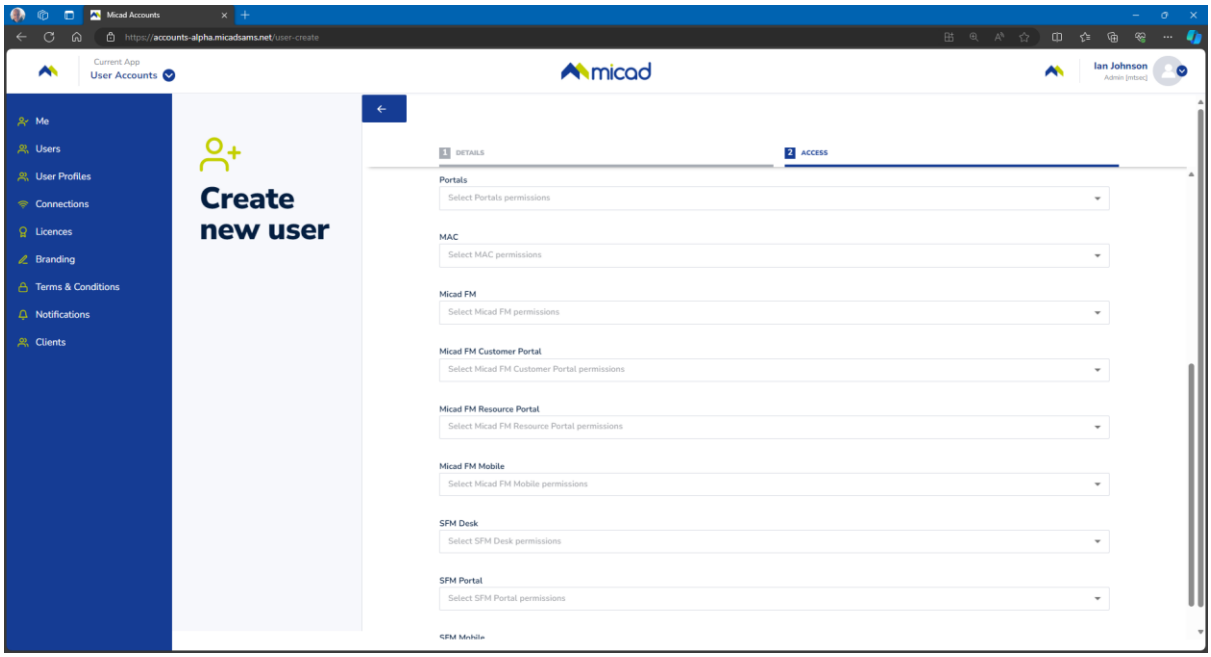

Figure 11: Creating New FM System User Details cont.

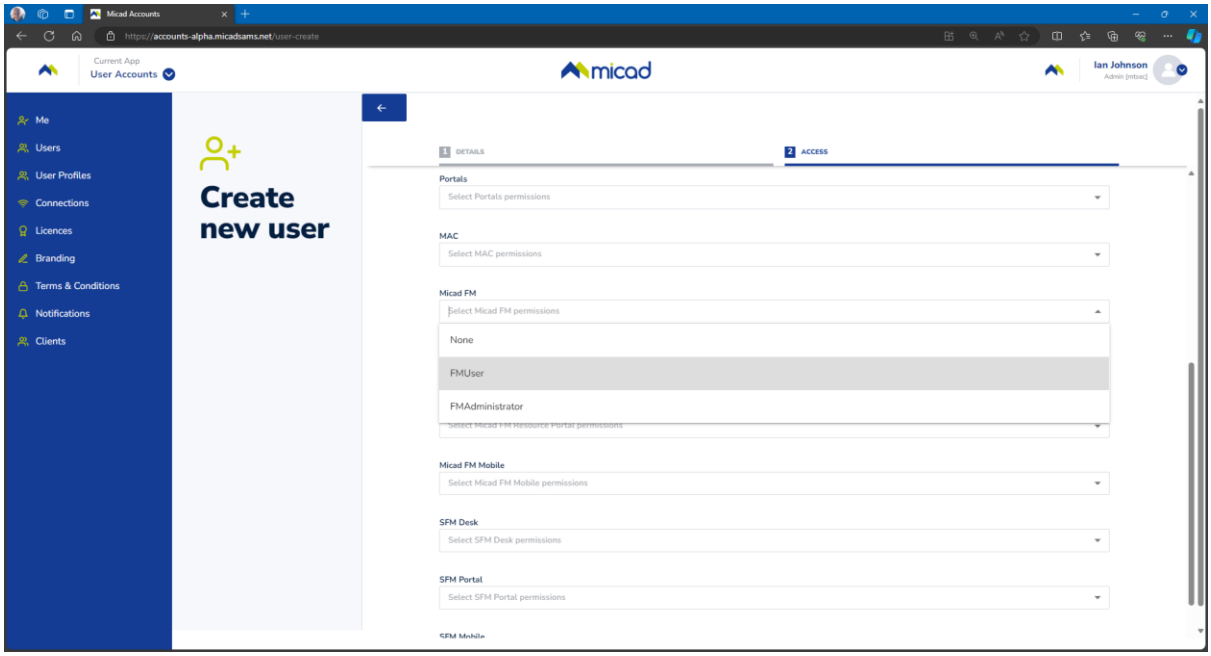

Figure 12: Creating New FM System User Details cont.

Scroll to the bottom and click “Save this user”

You will get the confirmation below to see the user has been created and they will be sent an email to set their password.

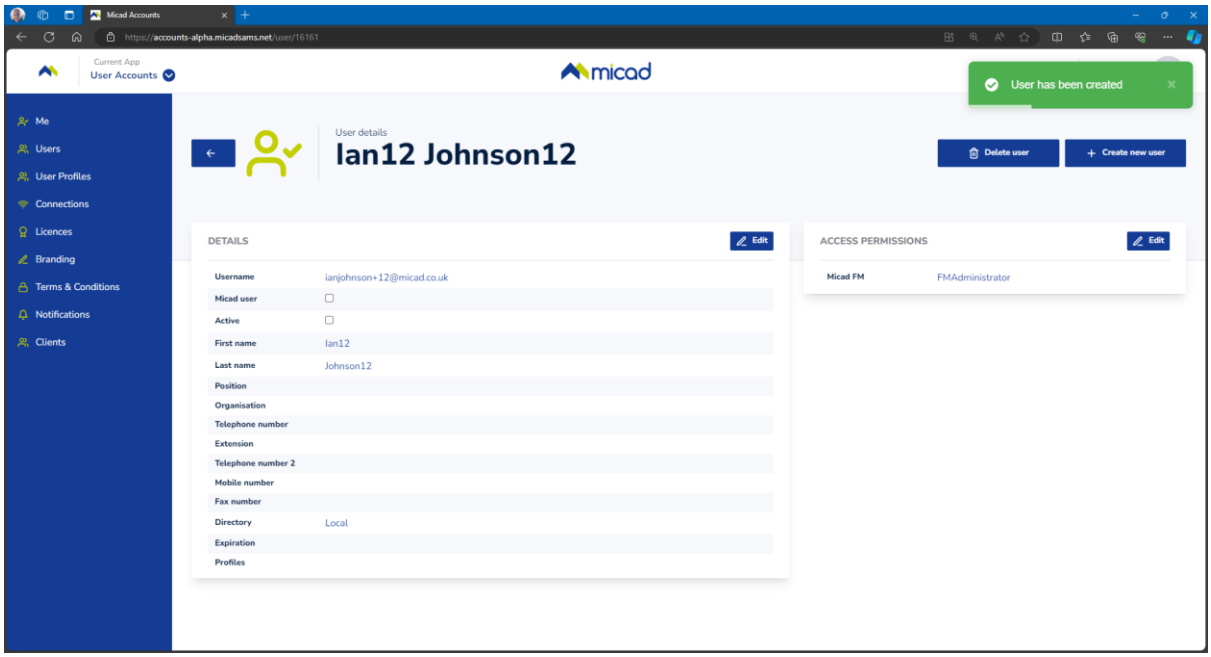

Figure 13: Creating New FM System User Details Confirmation.

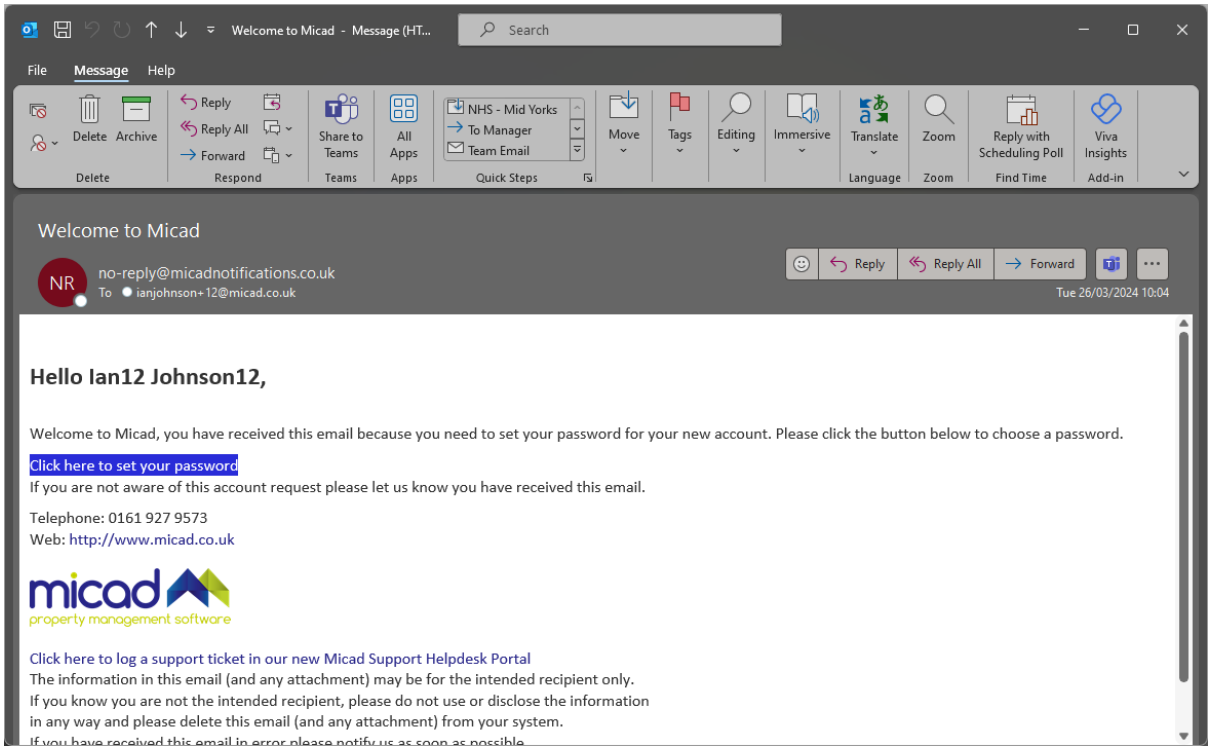

Figure 14: Creating New FM System User Password Email

Once the user has set their password, upon logging in for the first time they will go to the Micad Pro Hub

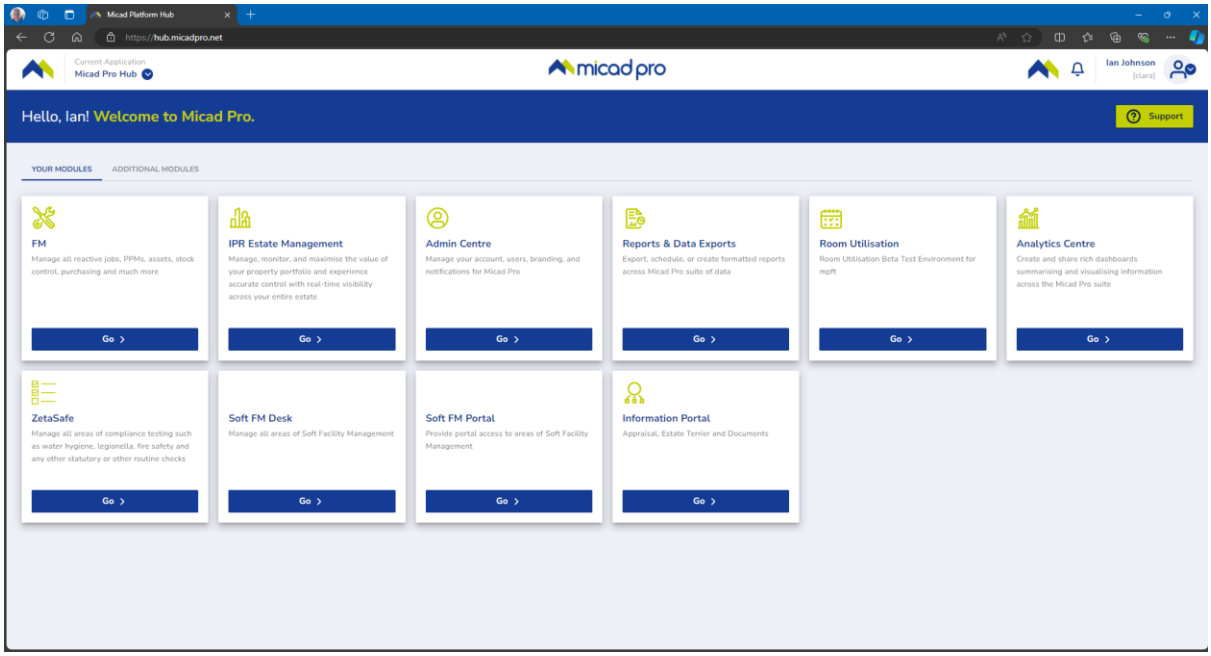

Figure 15: New FM System User in Table

The user will have the FM tile to get to the application

Back in the main FM application navigating to Administrate -> System Users -> System Users will allow you to set the permissions for the FM Application, by clicking on edit for the newly created user.

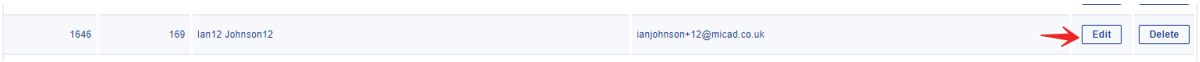

Figure 16: New FM System User in Table

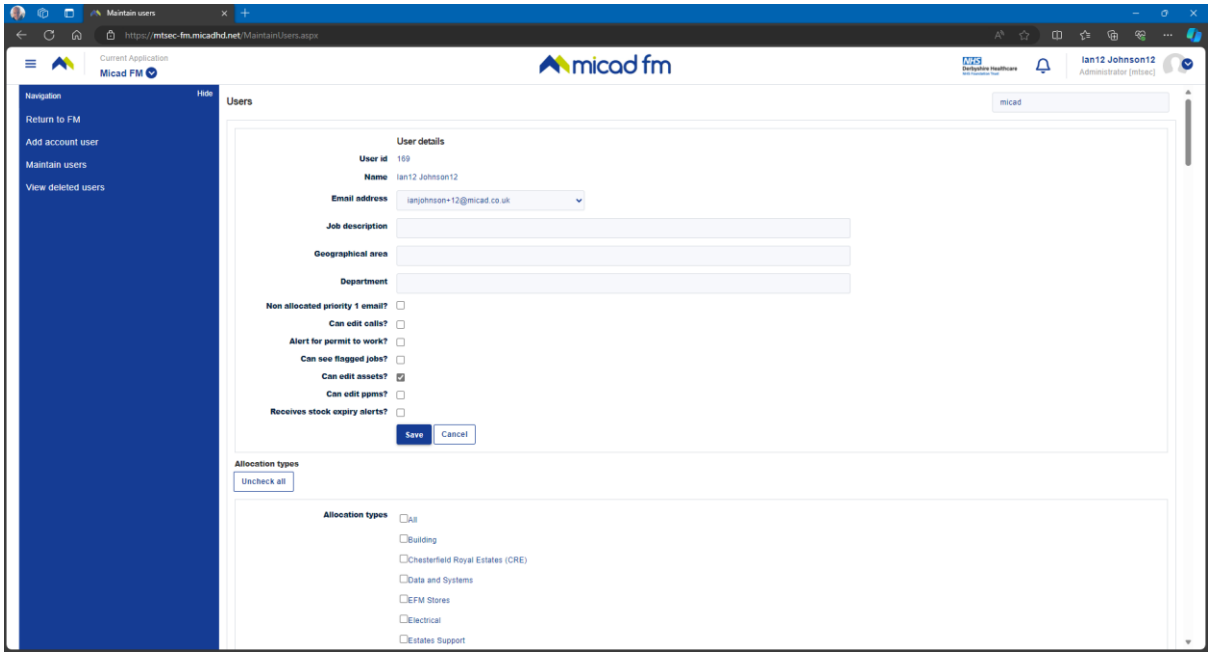

Figure 17: New FM System User Application Permissions

If you person already has a Micad account for other applications and you wish for them to have access to FM, simply give them the permissions as above and have them navigate to the FM application for the first time. This will create their profile within FM to then further add their permissions, allocation types etc.

Major Security & Design Changes – Customer Portal

Much the same as FM, the customer portal (CP) is now powered by central security. All the existing users currently accessing your portal, will be migrated into central security and on first login, be asked to reset and set a strong password.

Navigating to Administrate -> Web Portal / Mobile -> Manage Customers will now load all the customers via the central security accounts page

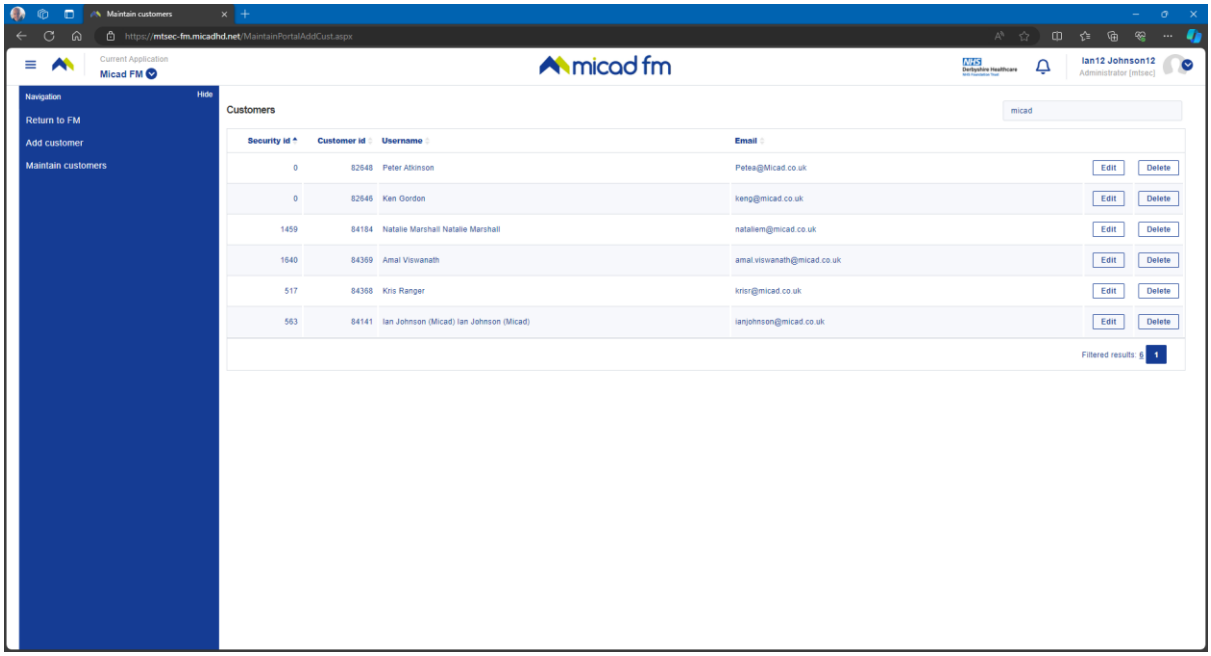

Figure 18: New Manage Customer Screen

And you will be able to click on each customer who has registered on the portal to configure their accounts

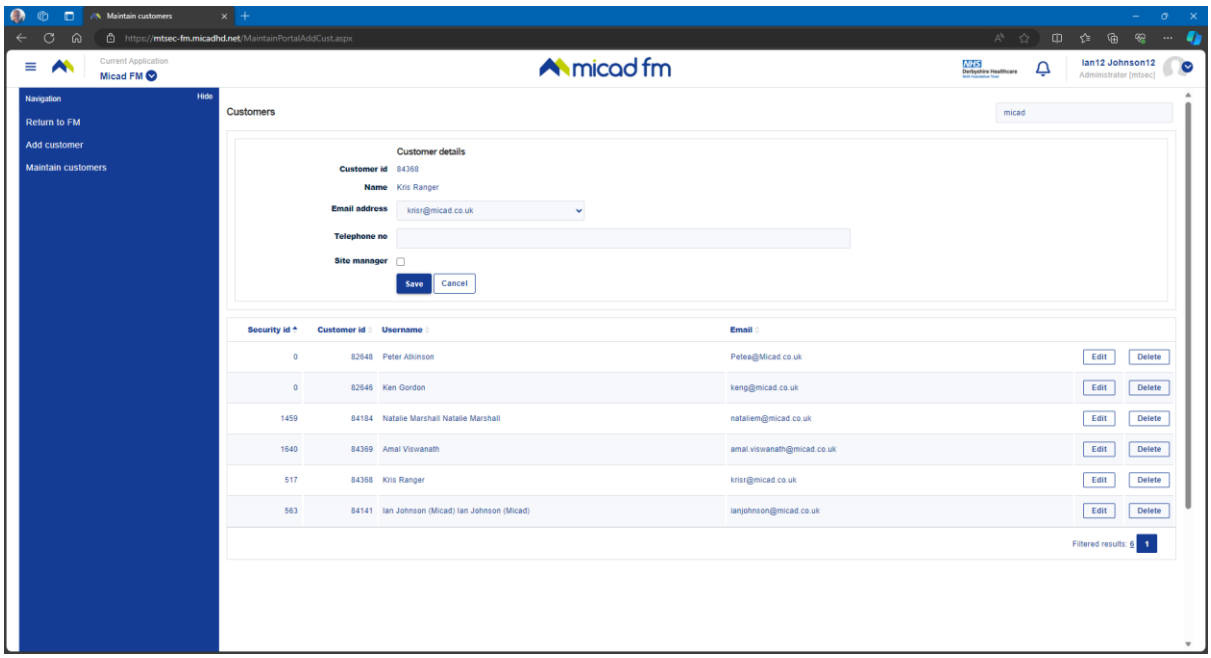

Figure 19: New Customer Record

Once logged into the CP, user will notice that the style has been completely revamped in line with all Micads new products. The functionality and buttons of the pages have not changed.

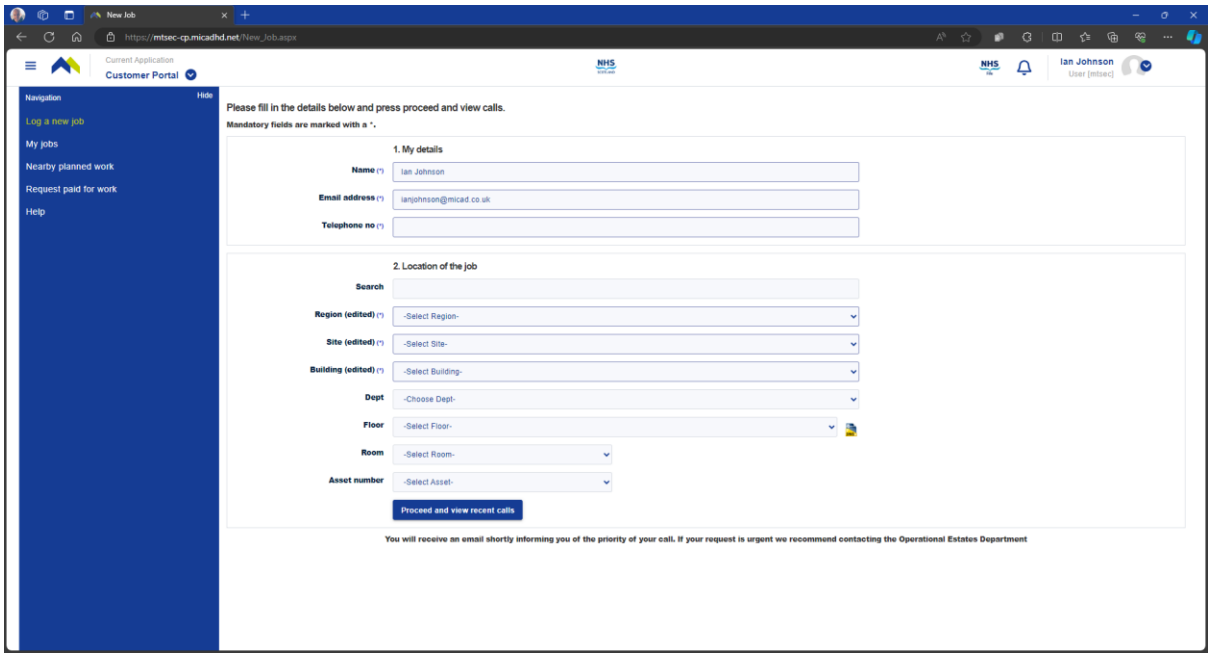

Figure 20: New Customer Portal Interface

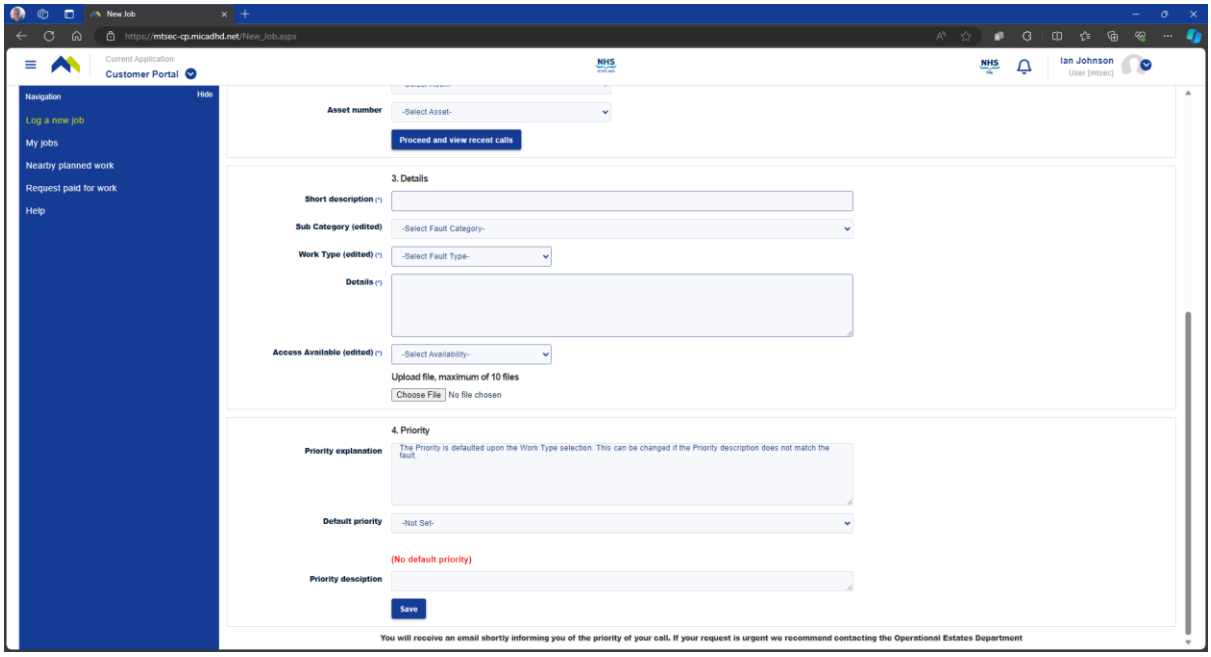

Figure 21: New Customer Portal Interface cont.

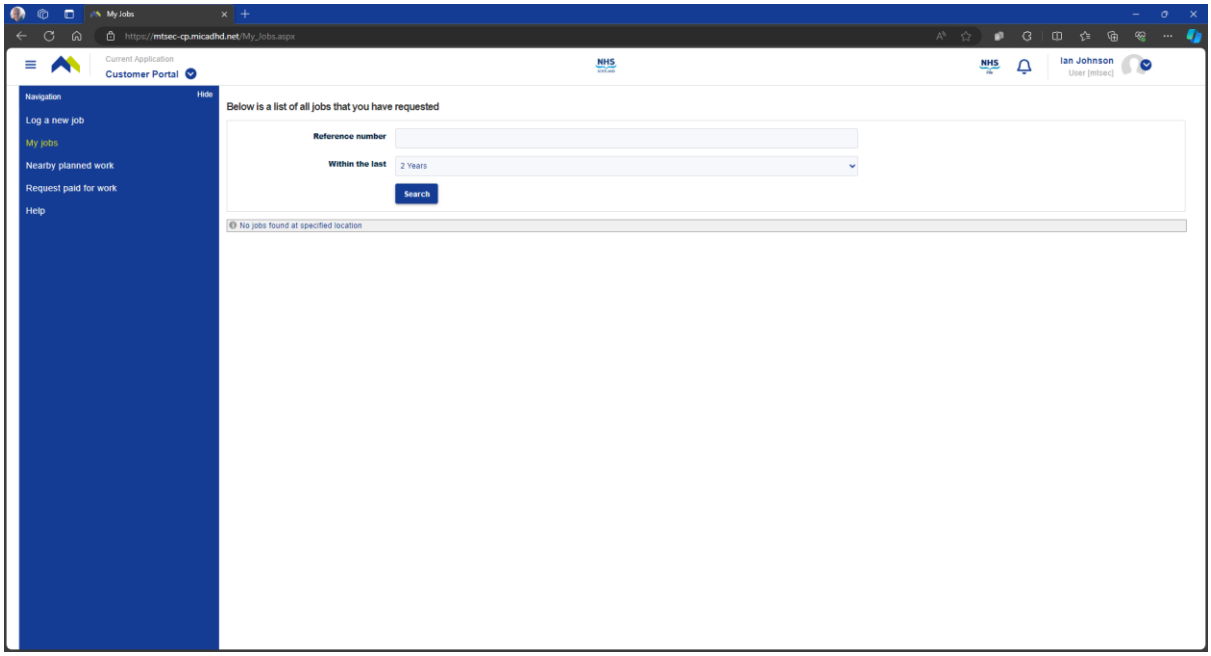

Figure 22: New Customer Portal Interface cont.

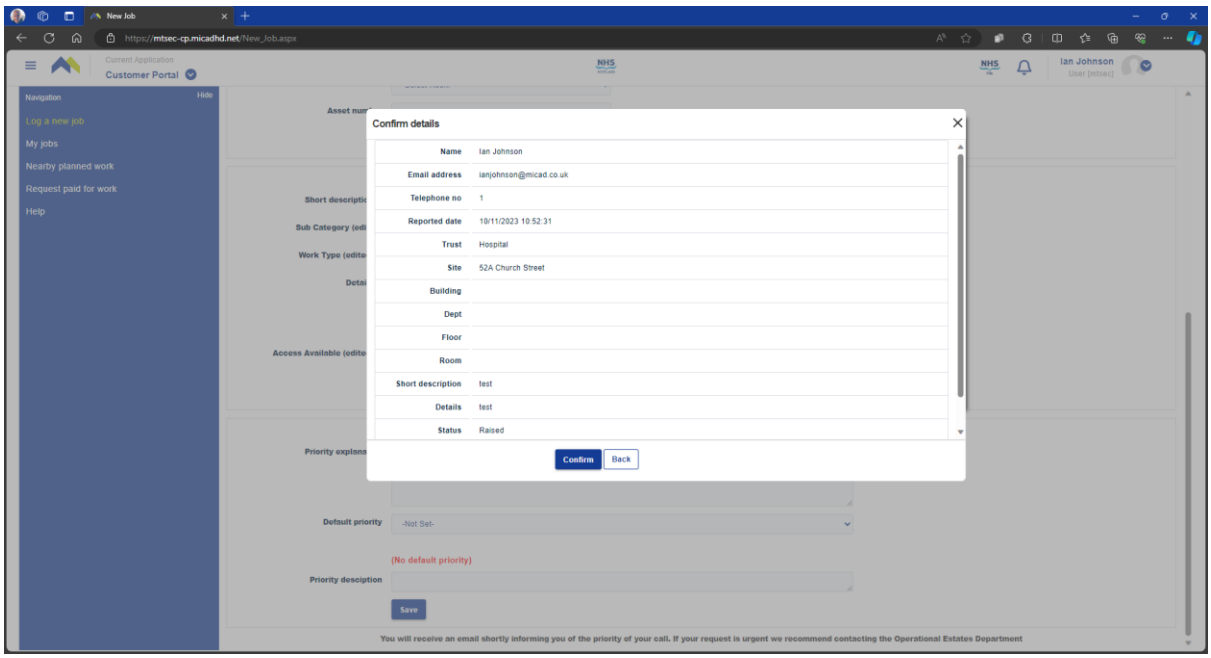

Figure 23: New Customer Portal Interface cont.

Existing Micad Customer Portal Users

As is probably the case with most of our client base, customer portal users most likely never previously existed in Micad Central Security accounts for applications like the IPR. Therefore, we will create accounts for Customer Portal users currently registered with your instance of Micad FM and create them an account.

Upon first login the user will be asked to set a new strong password to be used with the customer portal going forward.

New Micad Customer Portal Users

Much like the previous version of the Customer Portal, users can self-register for an account. Clicking on the customer portal URL will take you to the accounts login page and there will be a link to register.

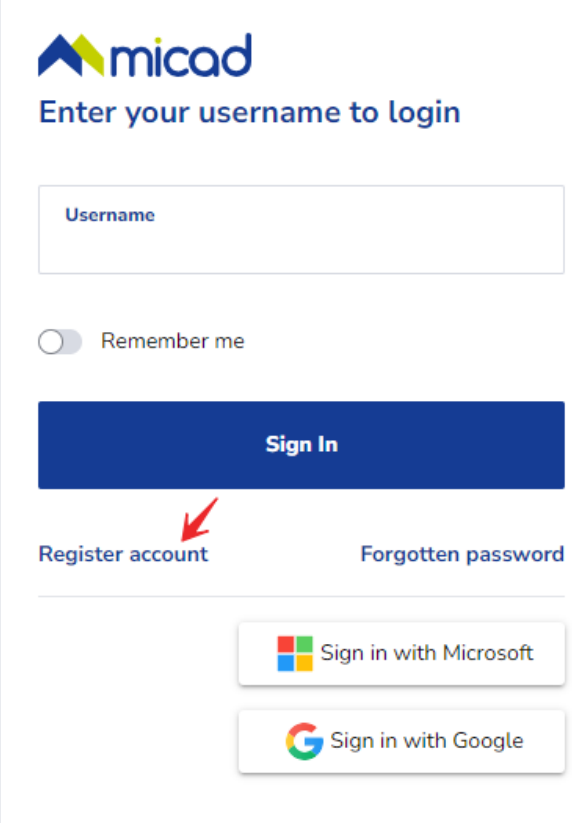

Figure 24: Register Link

On the next page complete the form by entering your email address, first and last name. The system identification key should already be populated if getting to this registration page from your customer portal URL.

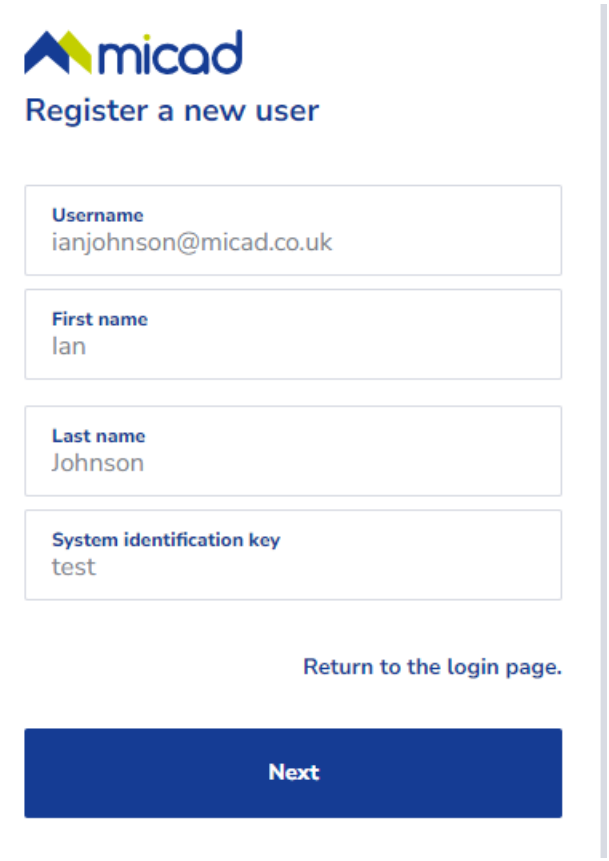

Figure 25: Register Form

Once the form is complete click Next and the following message will be displayed

Figure 26: Confirmation Message

As instructed close this tab in your browser and check your email for password setting link the same as in Figure 14 above. Once the password has been set you will be returned to the login screen and after successfully logging in with you newly created password you will arrive at the Customer Portal Log a Call Page.

Major Security & Design Changes – Resource Portal

Again, all External Resources will now have an account within the Micad Central Security platform. And will be granted access as per the below

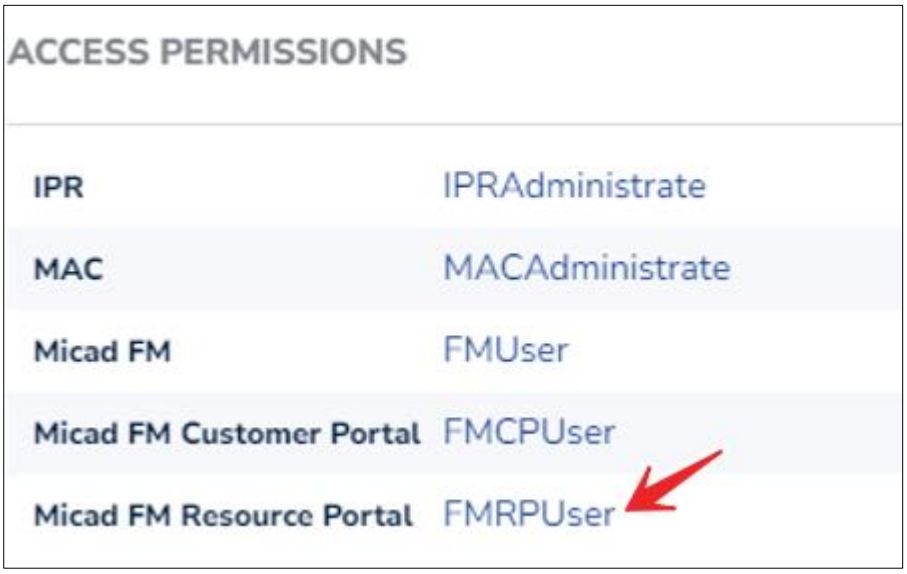

Figure 27: New Permissions

Once an external resource has this access you will be able to match their account, to their external resource within the FM software.

Previously when navigating to an external resource (Manage Resources -> External Resources), you would have prescribed their login details here:

Figure 28: Old Login Details

Now you will notice the resources pages have been recreated in the latest style.

Figure 29: New Extremal Resources Interface

Clicking on edit will show you the detail of the External resource and the above portal fields have now been replaced.

Figure 30: New Portal Email Field

This drop down will show you a list of accounts that have access to the resource portal but are not already linked to either an External or DEL resource.

Like the CP the RP has been completely redesigned in line with our other products. Again, no functionality or buttons have been altered, just the style and layouts to match our wider product suite.

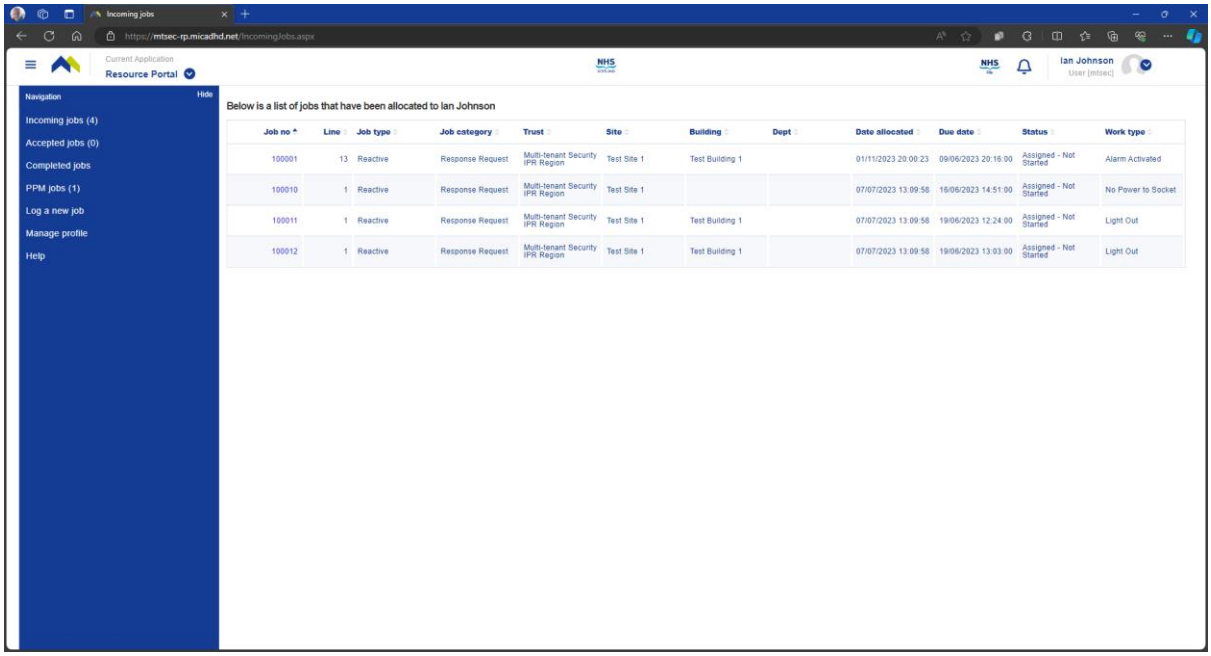

Figure 31: New Resource Portal Interface

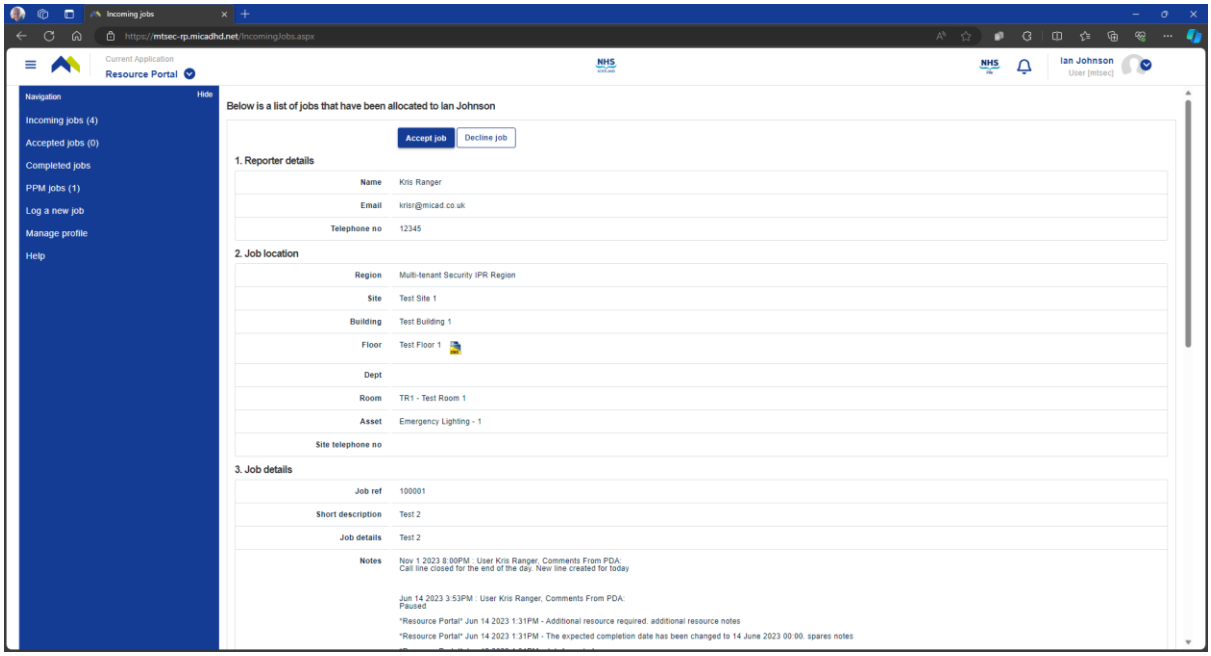

Figure 32: New Resource Portal Interface cont.

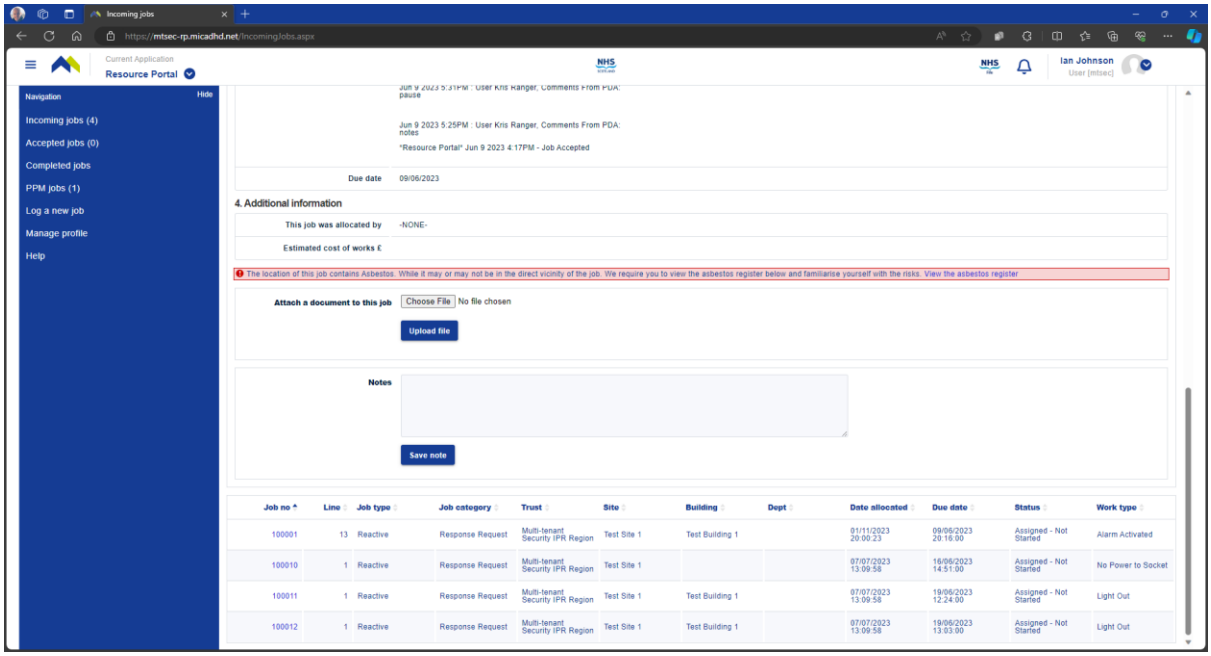

Figure 33: New Resource Portal Interface cont.

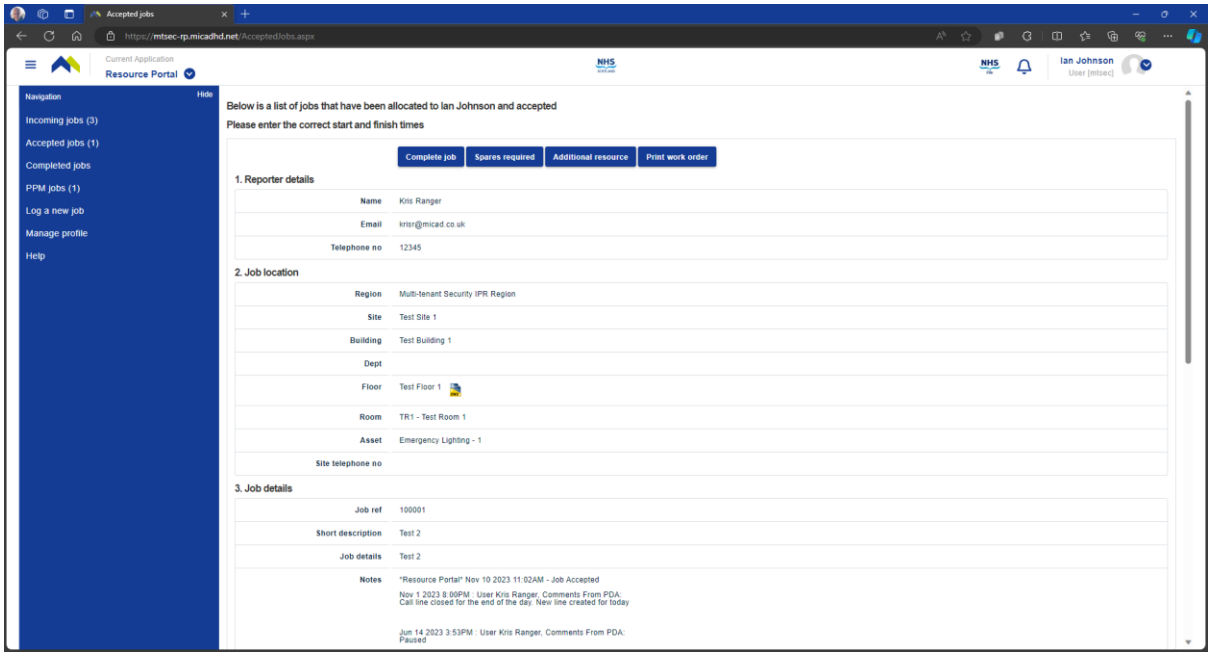

Figure 34: New Resource Portal Interface cont.

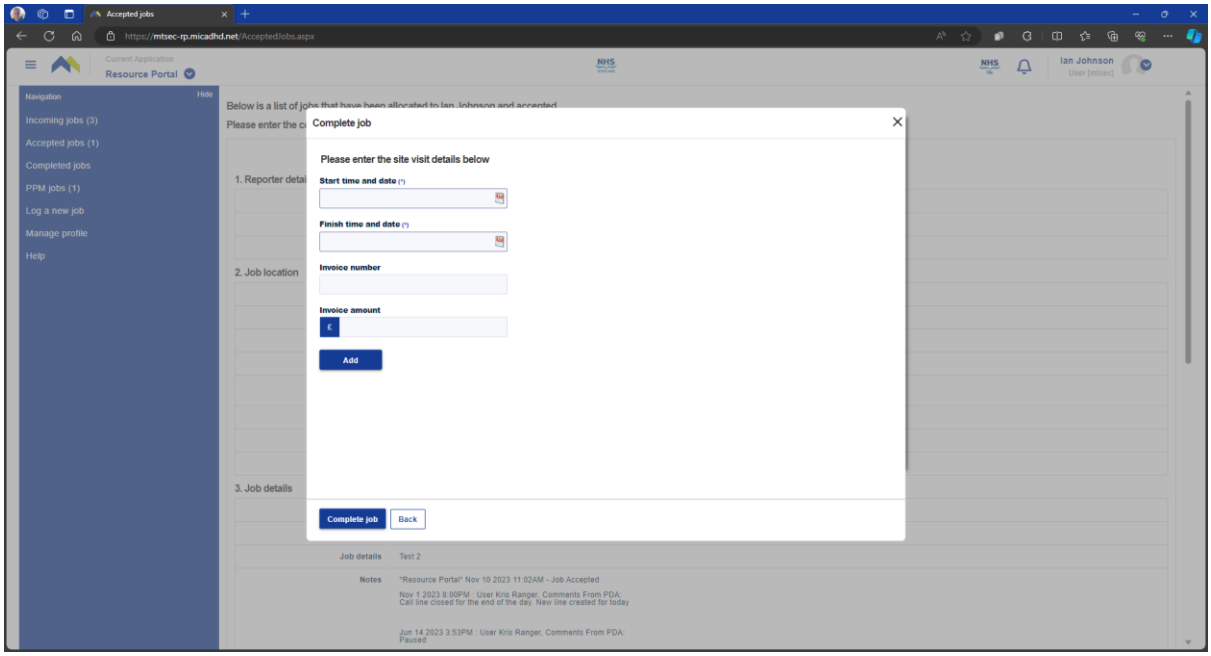

Figure 35: New Resource Portal Interface cont.

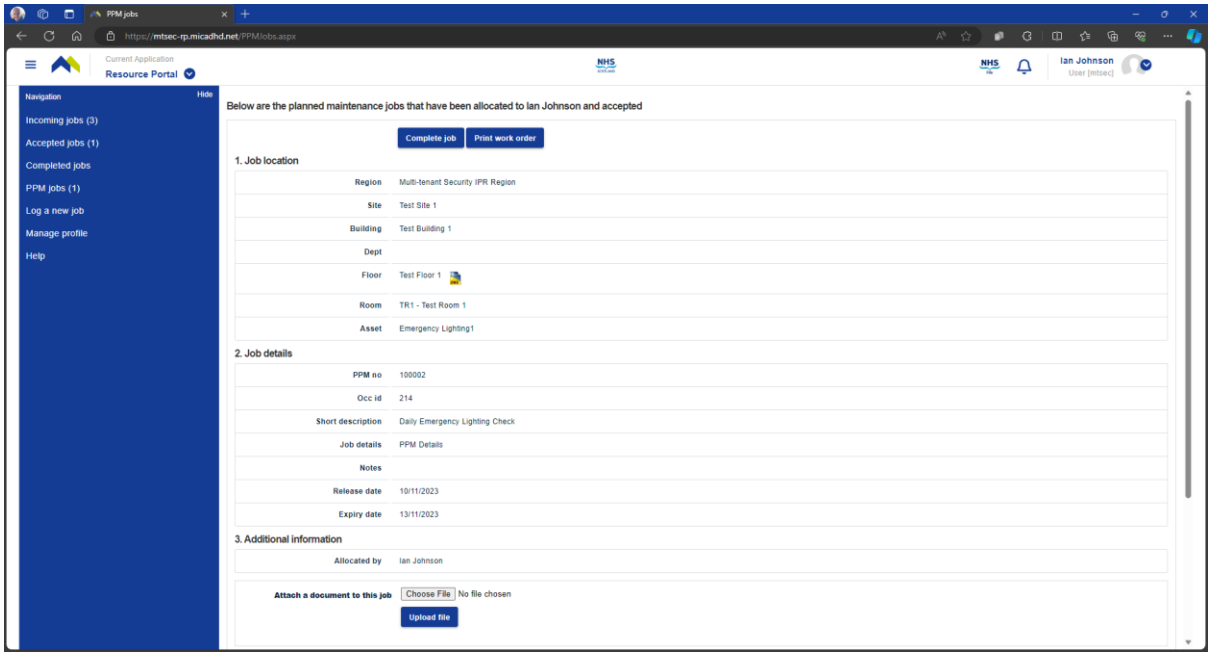

Figure 36: New Resource Portal Interface cont.

Existing Micad Resource Portal Users

As some external resources may already have an account in Micad Central Security to access the IPR or Portals, again when upgrading to FM v3.2.0 we will cross check to see what emails in the "Portal Email" field already exist in accounts and match them to the FM External Resource. Similarly, if the account does not already exist, we will create one and let you know the default password so that the contractor can login and reset their password when required.

New Micad Resource Portal Users

To create a new External Resource and give them access to the portal follow the steps below:

- Navigate to Administrate -> System Users -> System Users
- From the menu on the left click Add account user
- Complete the users' details including the companies email address as the username. A first and last name is required. If you want to enter the company name split it for example:

Figure 37: Creating the Resources Account

- Click Next and give them the below permission

Figure 38: Account Permission

- After saving the user you can return to FM and click on Manage Resources -> External Resources
- From the menu on the left click Add resource
- Complete the form and in Portal email address you should see the email address of the account you just created

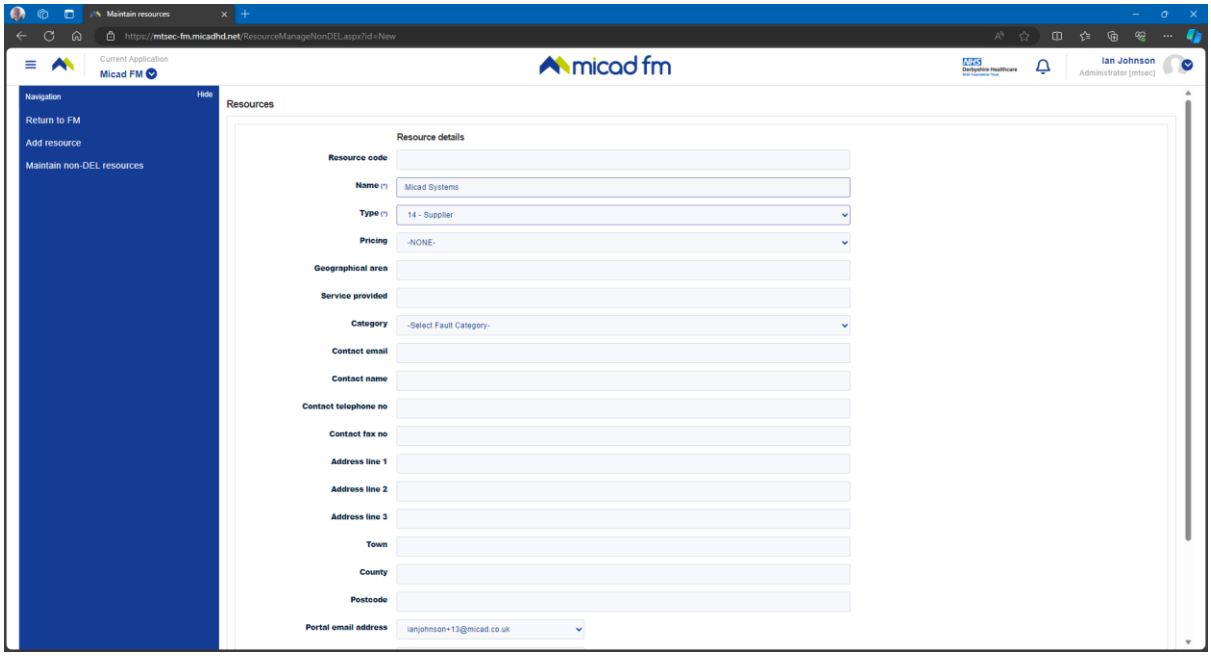

Figure 39: Adding Resource & Linking to Account

- Click save to create the resource which is linked to the account

- NOTE: If you add an account/portal email to a resource that already existed, the Name of the resource will get overwritten with the name of the accounts first and last name. Example: You've had a resource in your system for a long time called Company ABC, you decide to allow them access to the Resource Portal and setup an account in the name of your contact at the company John Smith. When attaching John's email account to this resource the name will change to John Smith so be mindful of what you use for the first and last name of External Resource Accounts.

Security Changes to Micad FM Mobile App

As all mobile App users already have a Micad Central Security account very little has changed here. All that is different is on the DEL resource in the FM software, whereas before you would have manually typed the email address in to link to the micad account. This…

Figure 40: Existing DEL Resource Email Address

has as well been replaced with a drop down of all the accounts which have the permissions for Micad FM

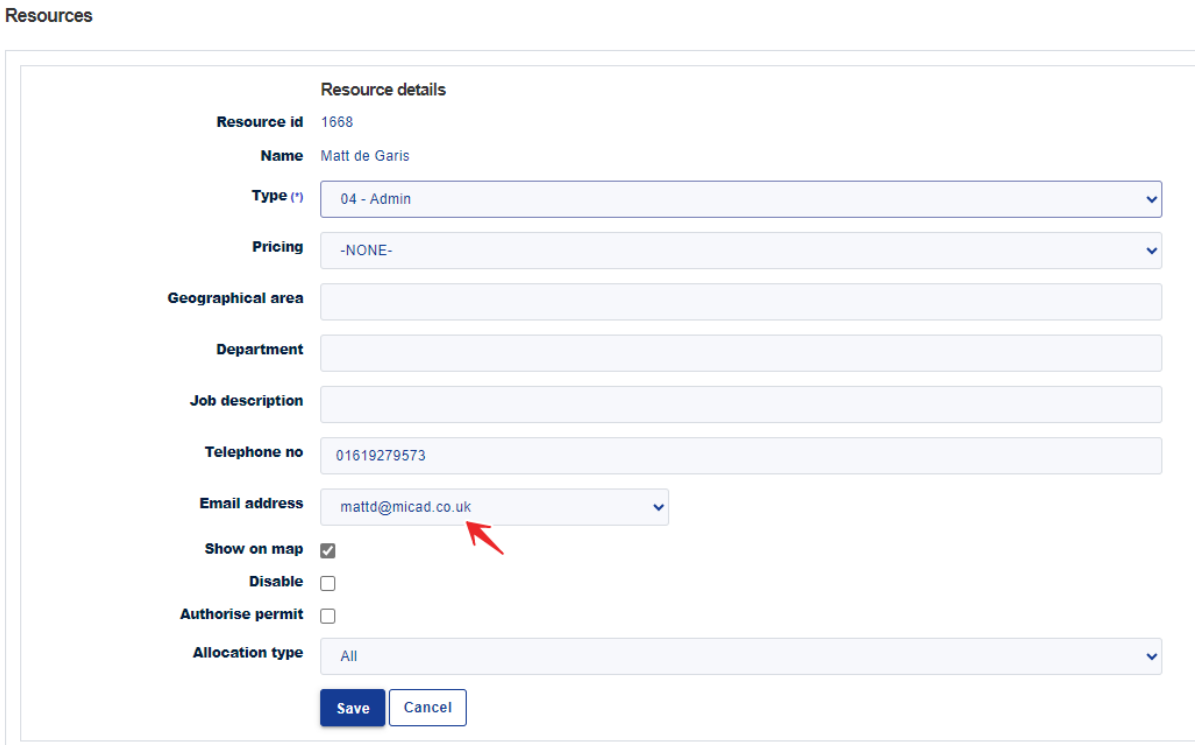

Figure 41: New DEL Email Address

This is so that mistakes cannot be made with manual entry and the resources is now physically linked with a correct account. Whereas previously it was advised you create the DEL resource first and then the account. It is now reversed, create the account so that when creating the DEL resource, you can attach the resource to the correct account of the same email address.

Existing Micad FM Mobile App Users

No changes other than once using the updated App v1.0.10 you will notice the login screen is different after entering the system ID. This is because it is now powered by Micad Multi-Tenant Security.

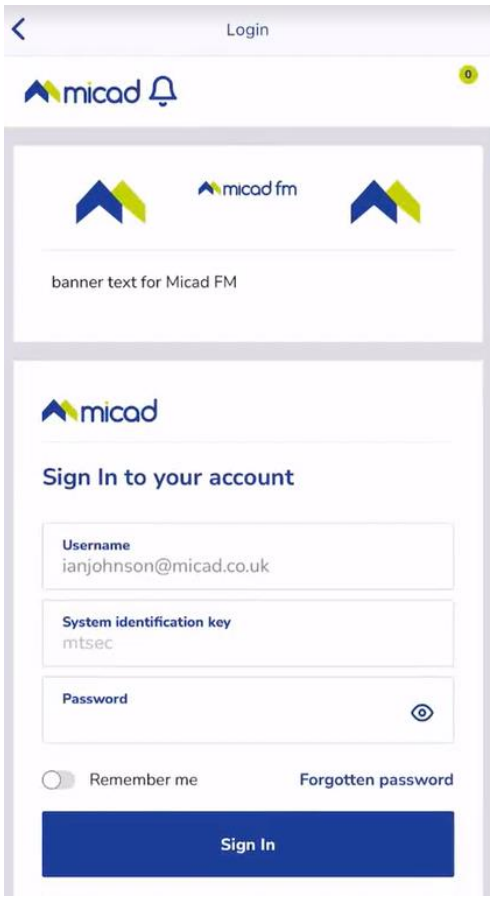

Figure 42: New FM Mobile App Password Page

New Micad FM Mobile App Users

You can follow the same guide as above for creating a new Resource Portal user accept rather than give them the "FMRPUser" permission ensure to give them the below. This will make the email address visible in the DEL resources list of resources to match a resource to an account.

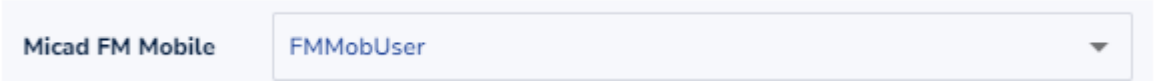

Figure 43: FM Mobile App Permission

Branding

Much like the existing software where you can customise the homepage for the customer portal there are now branding options for all websites.

From the accounts software click **Branding** on the left menu, choose your module at the top and use the form on the right of the page to add custom text and images to brand your FM, CP or RP instance.

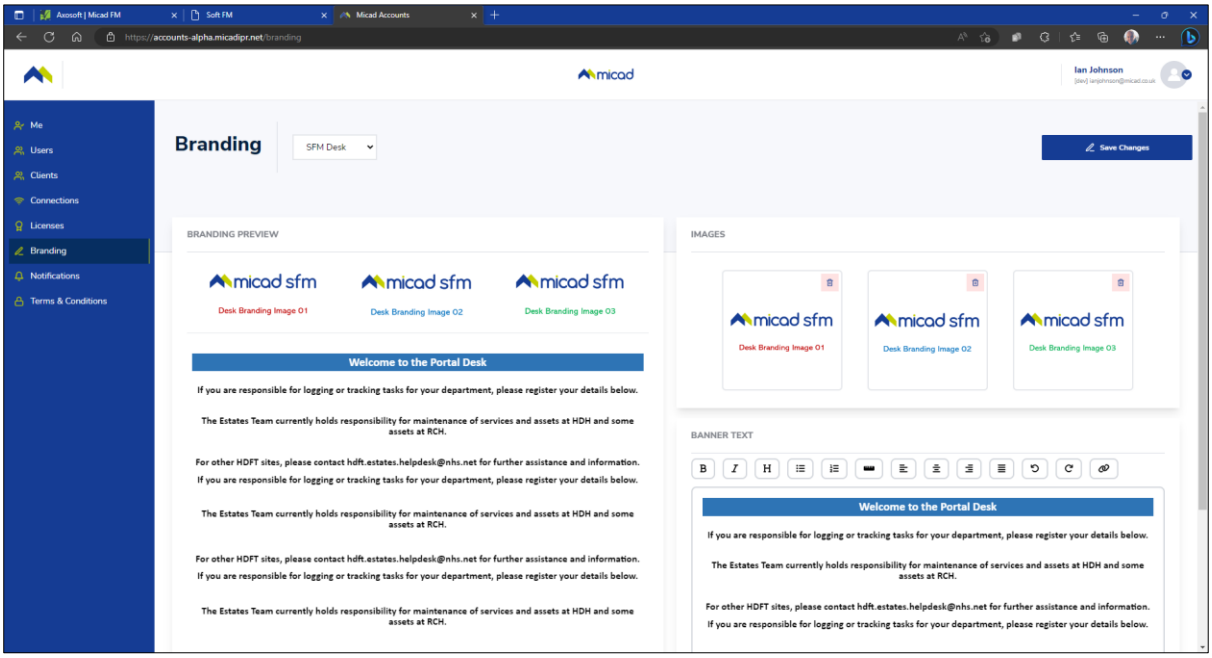

Figure 44: New Branding Options

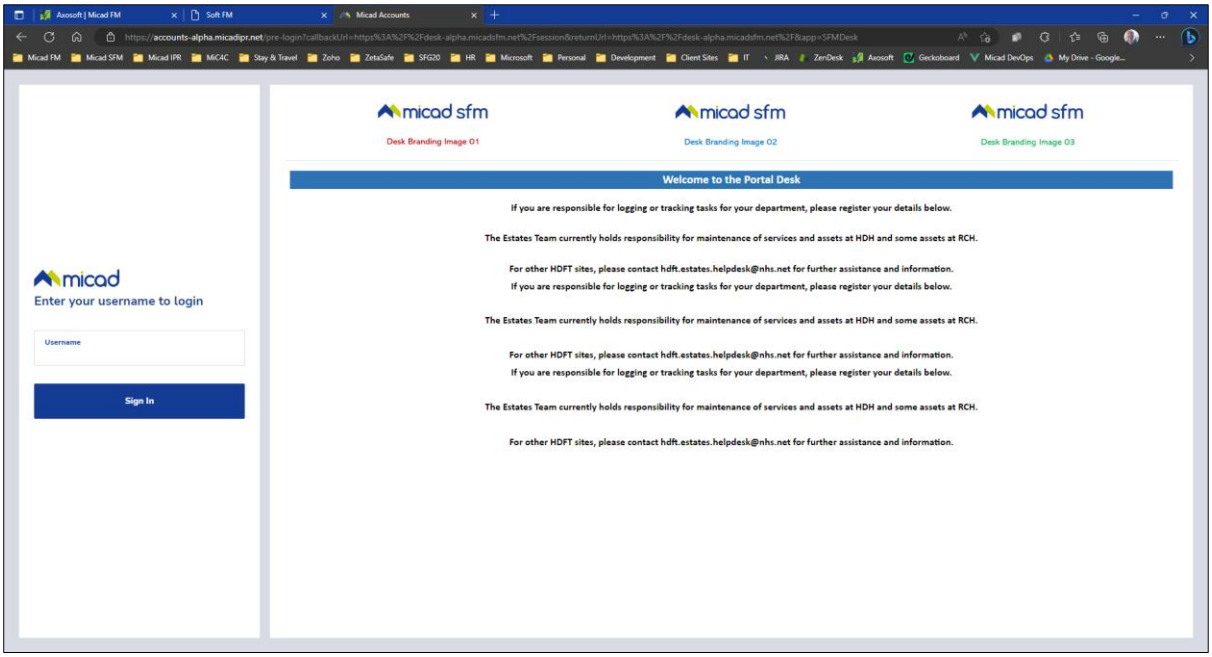

Figure 45: New Branding Options cont.

You can now also configure notifications to get important information to users on a temporary basis.

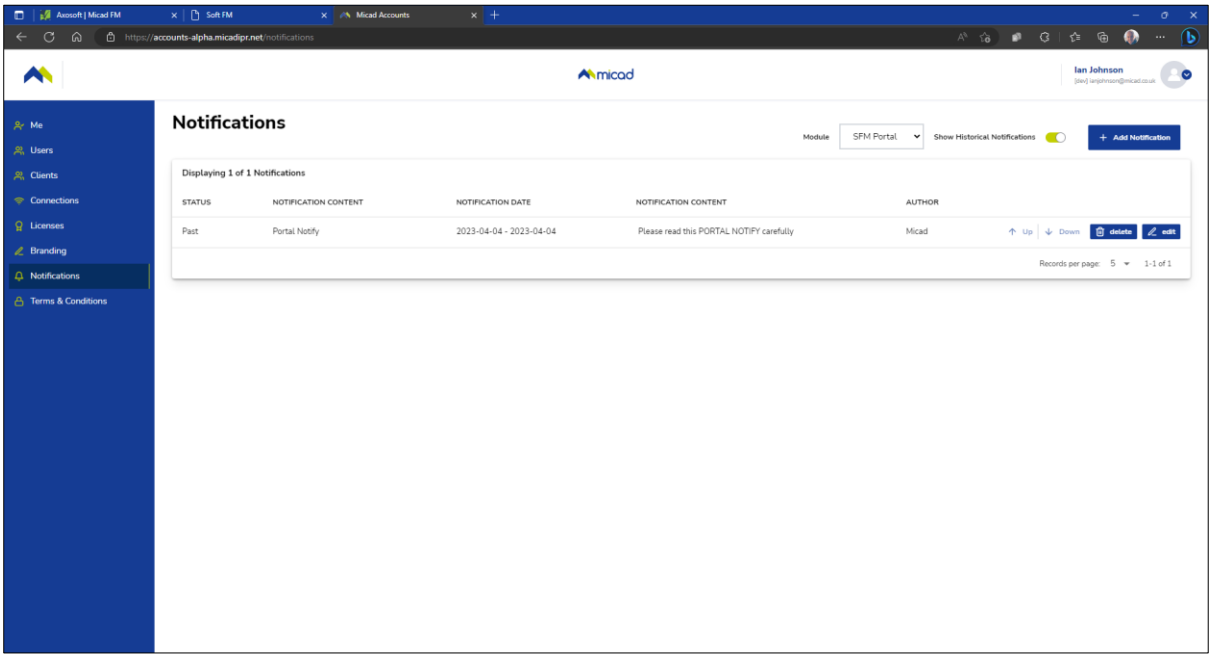

Figure 46: New Notification Options

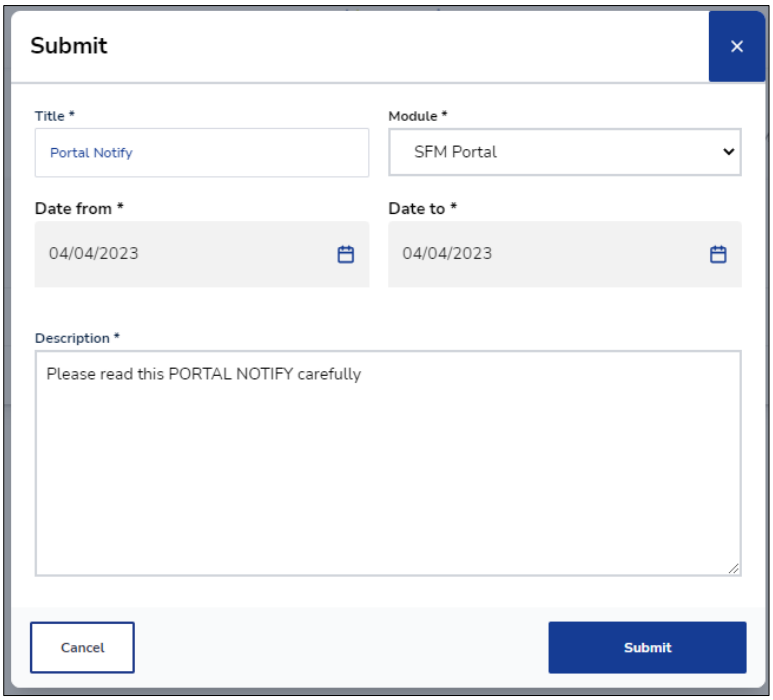

Figure 47: New Notification Options cont.

This will display on any device including mobile apps once all apps have been updated

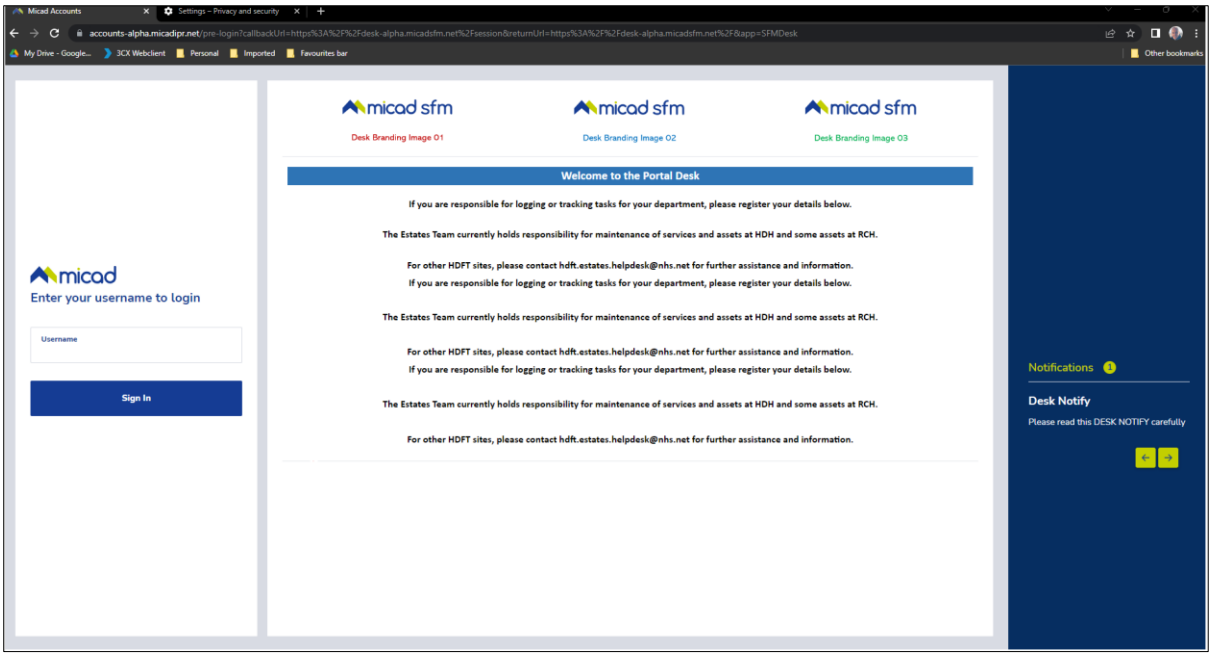

Figure 48: New Notification Options cont.

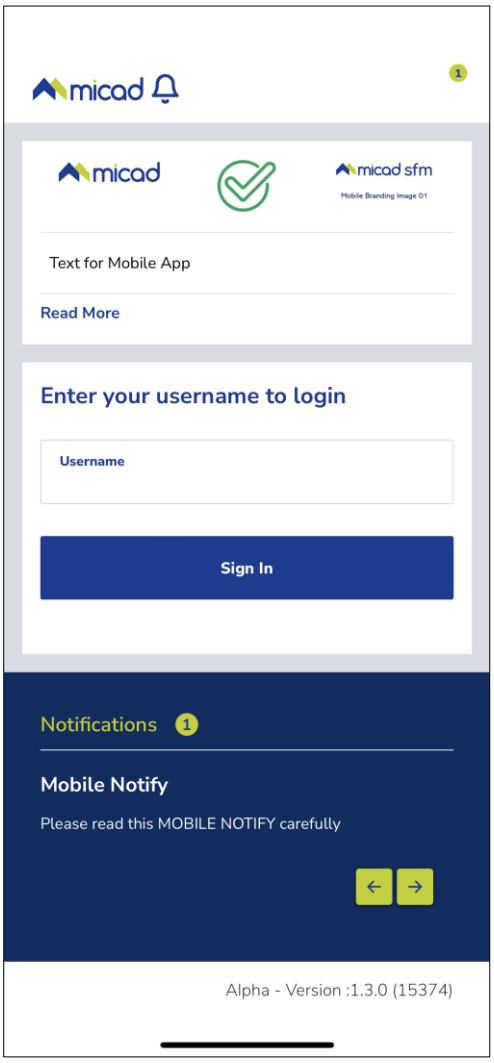

Figure 49: New Notification Options cont.

Business Use

And you can now publish Terms and Conditions which users must agree to upon first login. Again, this works for desk and mobile applications.

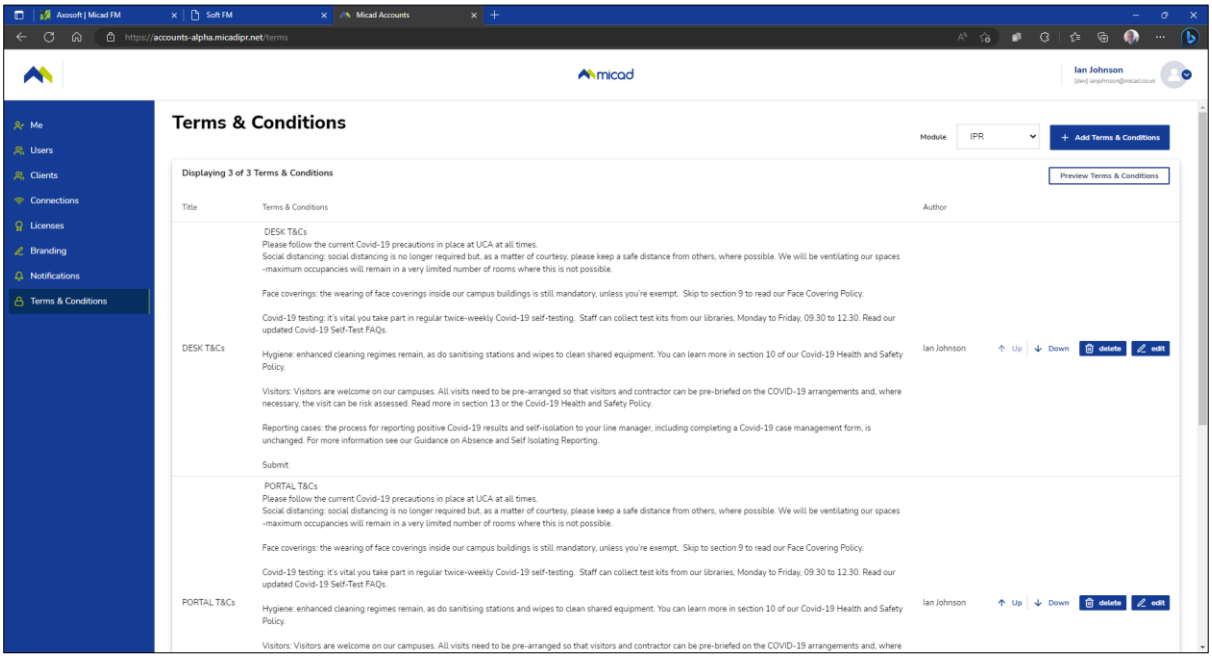

Figure 50: New T&Cs Options

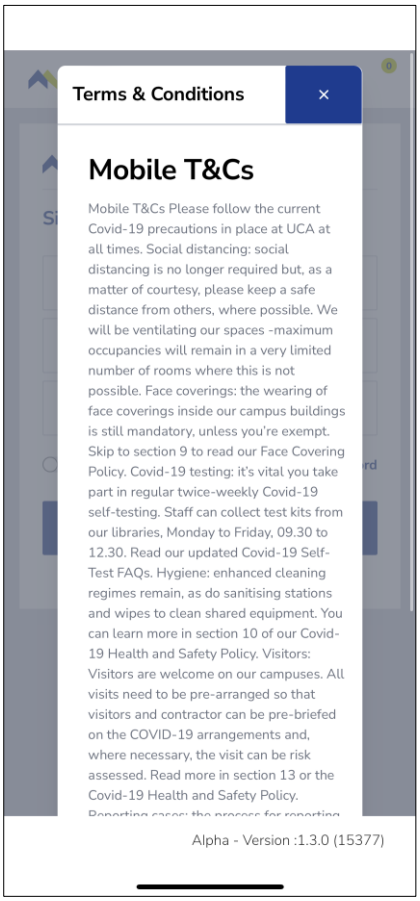

Figure 51: New T&Cs Options cont.

Developments and changes

v3.2.0

PPM Module

#11166. A new page has been added for Allocated PPMs much the same as allocated jobs for reactive

#12770. You can now capture Cost Centre, Account Code & Scheme against a PPM location. The Cost Centre and Account Code field work the same way as reactive now either free text or drop downs based on system settings.

#12771. The data held within 12770 will now also get copied to the PPM Occurrence at the time the job is completed. Meaning if you change the values of those 3 fields at the location level, the occurrence will always have a historical record of what they were at the time they were completed.

#12772. The time bookings section of the PPM Occurrence has been expanded to include invoice information. Same as the reactive module, this information can be completed via the Resource Portal also.

Resource Module

#12773. Any documents uploaded by Resource Portal users are now visible against those External Resources in Micad FM and can be manged (deleted etc.) from there.

Assets Module

#12133. The asset page now has an export to excel option

#12136. Location cost code information has been added to the maintenance contracts assets now

Bug fixes and improvements

v3.2.0

#11701 – If a file was uploaded that contained a # in the file name the system would allow the upload of that file but be unable to open it. Additional validations have been put in place to prevent this.

#11851 – Searching on the maintenance contracts page now also includes searching the contractor's name as well as the contractor reference.