mri strata master



SFTP Document Upload Guide

Table of Contents

Unique SFTP Credentials 1
Open Source SFTP Client 1
Adding Documents to the SFTP 2
Importing Documents in the Portal 3
Managing the SFTP 5

Unique SFTP Credentials

If you have never used the SFTP uploader before or have previously used it but have forgotten your credentials, please contact support and request to be shared valid credentials to access your organisation's SFTP.

Note: To receive credentials, you'll need to share with support the IP address of the computer that will be used for the SFTP upload. We'll register the IP address for security purposes.

Open Source SFTP Client

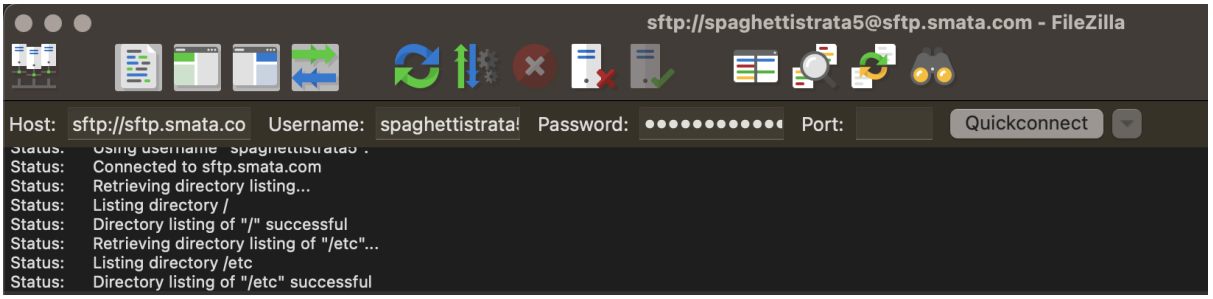
To use the uploader tool, documents must first be added to an open source SFTP client. You may use any software that supports this, however, if you don't have a preference this guide will include instructions on how to use the FileZilla Client.

To download the FileZilla Client and gain access to your SFTP folder, click the link below and follow the instructions.

[Download the FileZilla Client]

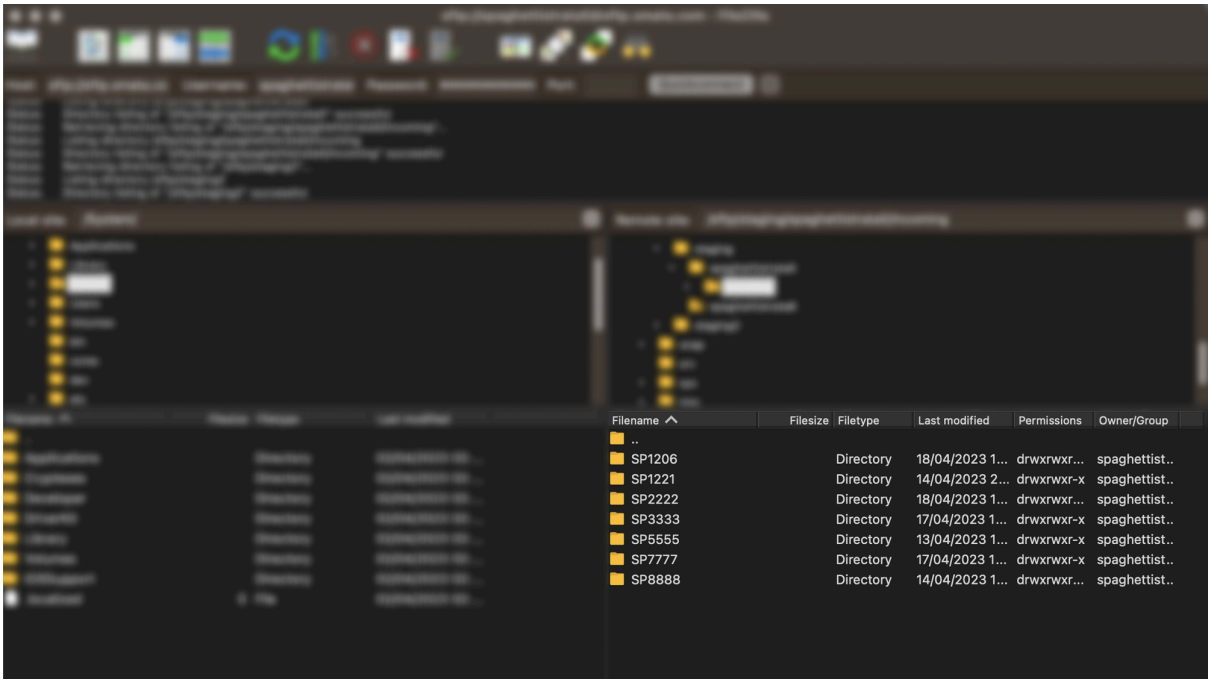
Adding Documents to the SFTP

First, enter your organisation's unique SFTP credentials into the SFTP client.



Then click 'Quickconnect'.

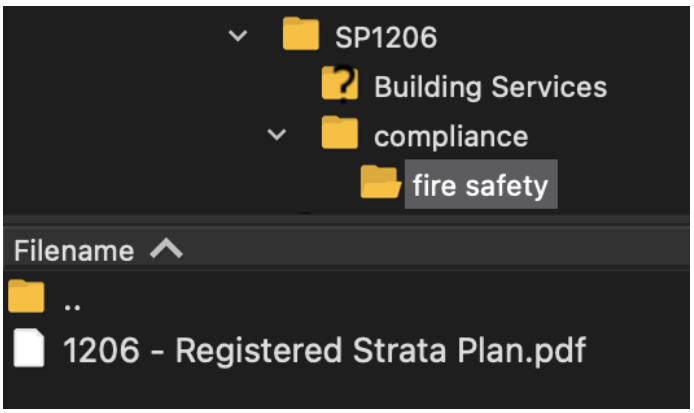
The section in the bottom right of FileZilla is the SFTP for your organisation. Files that need to be transferred to MRI Strata Connect's Document Management System will need to be added here.



Before adding documents to the SFTP, ensure they match the following folder structure:

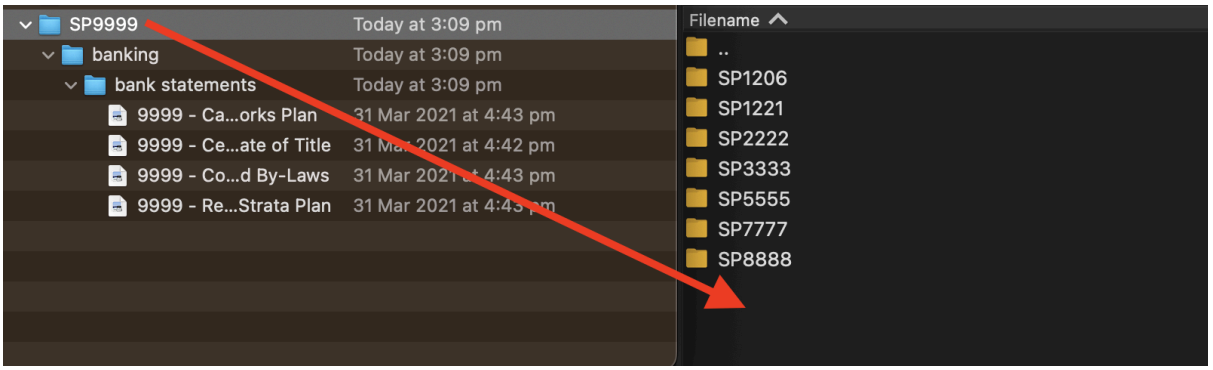
Plan number (with SP prefix) > Category > Tag

For example, a document saved in the folder structure SP1206 > compliance > fire safety will be saved under building SP 1206 with the compliance category and an additional tag for fire safety



Locate the files you wish to transfer to the Portal in your local file explorer and drag and drop them to the section in the bottom right of FileZilla.

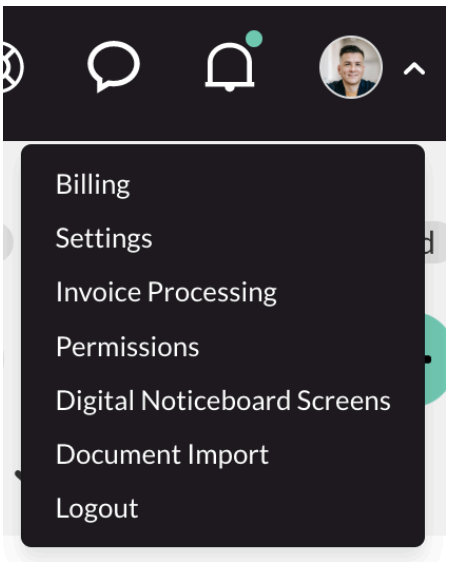
Note: The following file types are supported: .pdf, .tiff, .tif, .doc, .docx, .msg, and .eml. Only files under 60mb are in size are supported.



Once the folder is saved in the SFTP it is ready to be uploaded to the Portal.

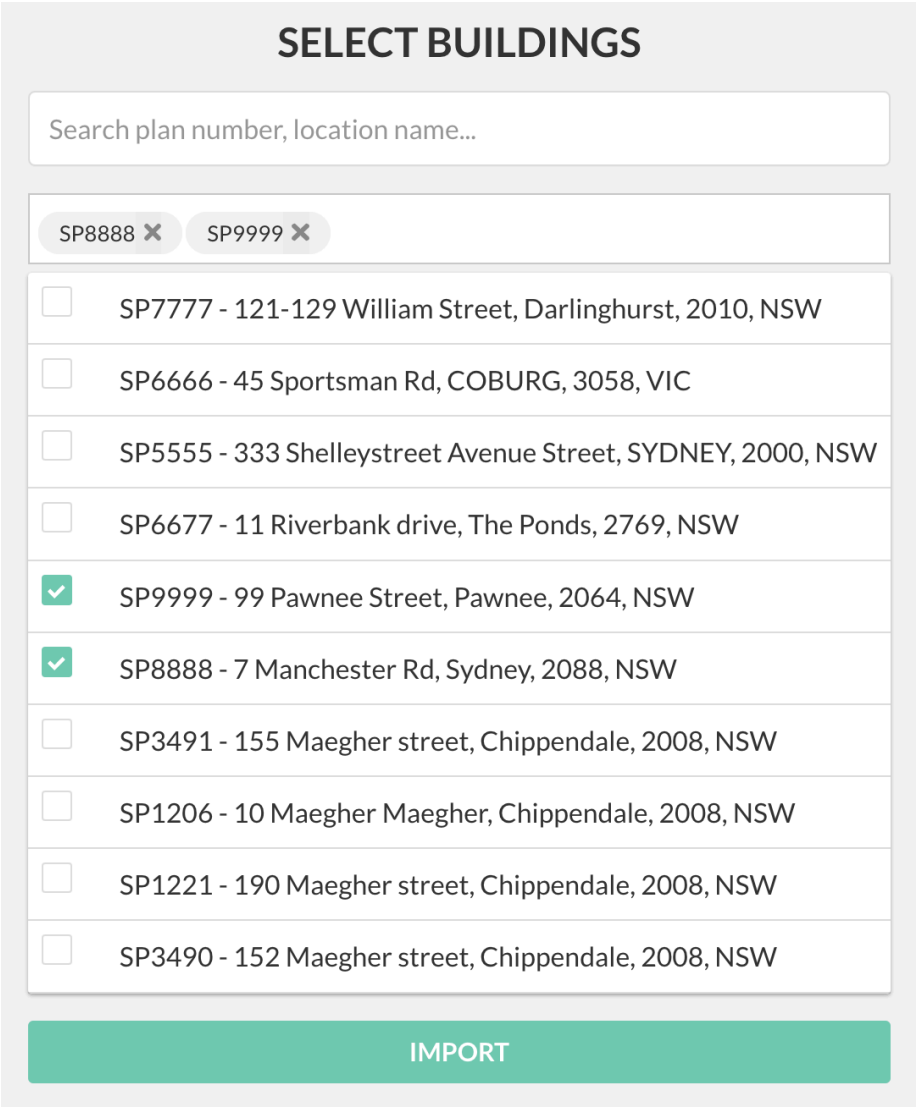
Importing Documents in the Portal

In the Portal, click the avatar in the top right corner and click ‘Document Import’.



Select the buildings that documents should be uploaded for.

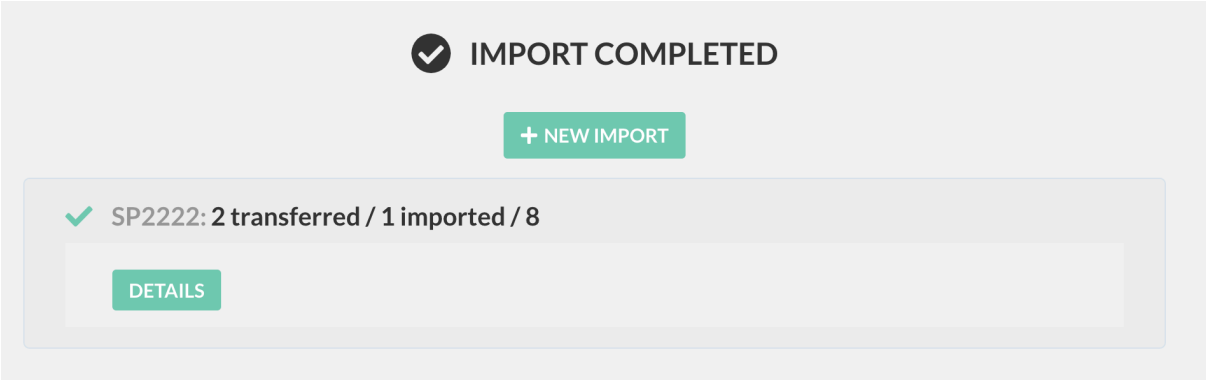
Note: one or more buildings may be selected at one time.



The buildings selected should match a folder saved in the SFTP including the prefix. If the selected buildings do not match a folder the import will be unsuccessful.

If the folders have been saved in the SFTP and the folder structure is correct, click ‘Import’.

You’ll be able to track the progress of the import, including how many have transferred to the server and how many have successfully imported.



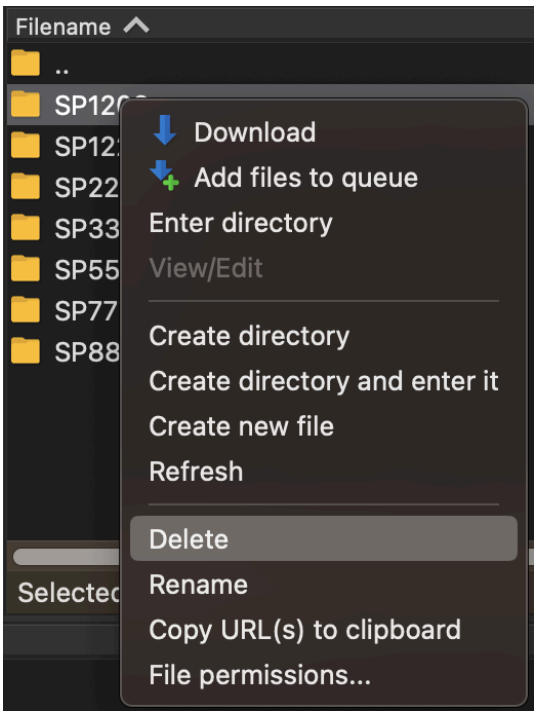
Click ‘Details’ to view the details of the documents that have failed.

Click ‘+ New Import’ to import additional documents.

Managing the SFTP

For additional imports, the system won’t identify duplicate documents that have already been imported if they are still in the SFTP. If the same building is selected for an additional import and the documents in the SFTP are the same as a previous import, the documents will be duplicated in the Portal.

To delete documents that have already been imported, right click on the folder or document and click ‘Delete’.


Filename
..
SP12
SP12
SP22
SP33
SP55
SP77
SP88
Selected
Download
Add files to queue
Enter directory
View/Edit
Create directory
Create directory and enter it
Create new file
Refresh
Delete
Rename
Copy URL(s) to clipboard
File permissions...