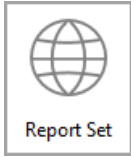


Report Set

Last Modified on 01/08/2023 10:52 am AEST



The instructions in this article relate to **Report Set**. The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

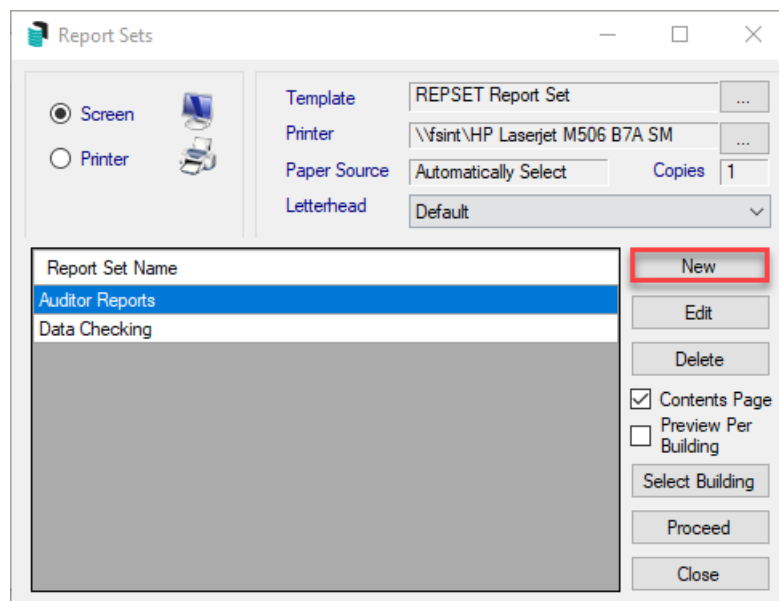
Report Sets have been designed for running specific set of reports quickly for Meetings, Financial Year Ends, Audits, Tax etc. for multiple buildings for either the current or old year where set.

Please note that where reports are able to select a lot, only one lot can be selected to report.

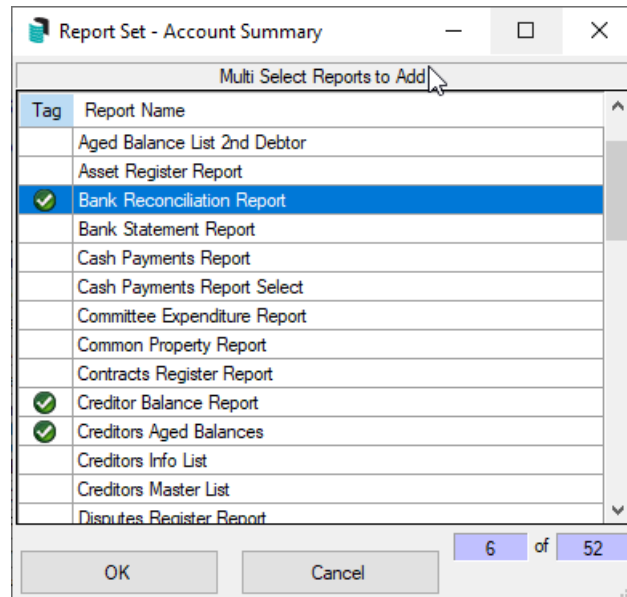
With the new *Report Distribution* area, some reports have been rewritten and are available to use in that area. The current list will be added as further reports are rewritten. For any reports that are not available in the *Report Distribution* screen, please use the **Report Set** options as outlined in this article.

Create New Report Set

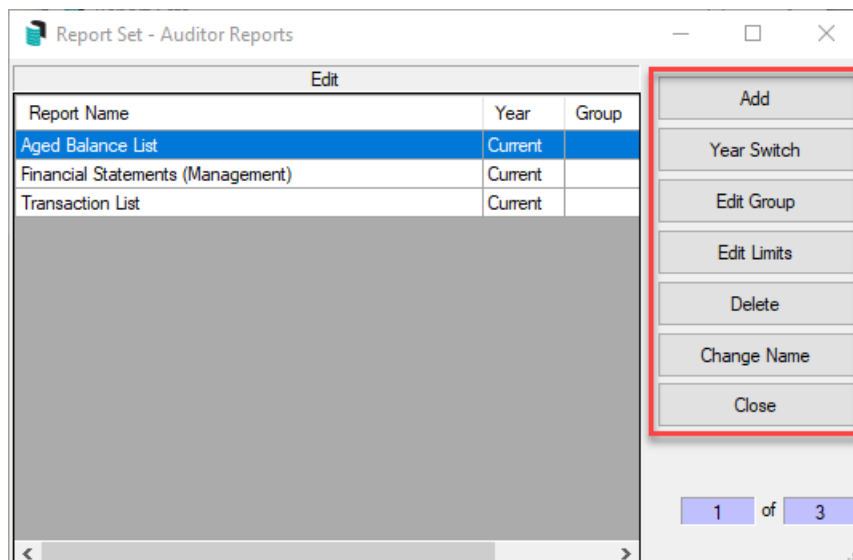
1. Search or select **Report Set**.
2. Click *New*.



3. Enter name of the new report and click *OK*.
4. Tag the required reports and click *OK*.

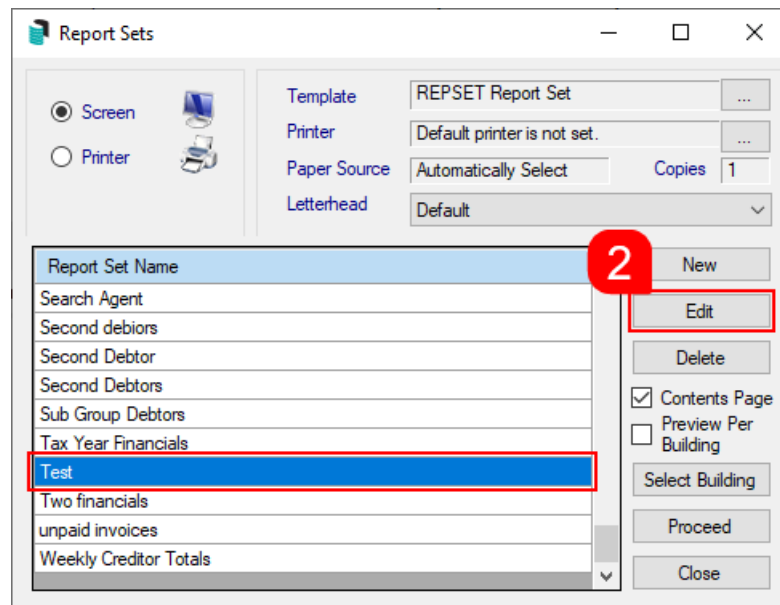


5. Whilst one of the reports is selected, clicking *Year Switch* will change the 'Year' column value to either 'Current' or 'Old'.
6. If applicable, click *Edit Group* to include sub-groups; select a Sub-Group and click *OK*.
7. Click *Edit Limits* to define further options for a particular report. Note that this is not available all reports.
8. Select *Close* when finished.

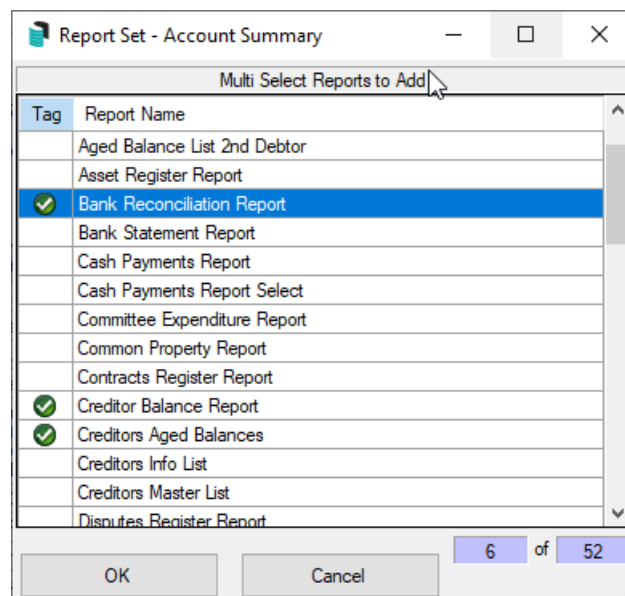


Edit existing Report Set

1. Search or select **Report Set**.
2. Select the report and click the *Edit* button.



3. Click the *Add* button to open the 'Multi Select Reports to Add' window and tag the required reports, then click *OK*.



4. Whilst one of the reports is selected, clicking *Year Switch* will change the 'Year' column value to either 'Current' or 'Old'.
5. If applicable, click *Edit Group* to include sub-groups; select a Sub-Group and click *OK*.
6. Click *Edit Limits* to define further options for a particular report. Note that this is not available all reports.
7. Select *Close* when finished.

Change the Name of the Report

1. Search or select **Report Set**.
2. Select the report, and click the *Edit* button.
3. In the 'Edit' screen, click the *Change Name* button
4. In the 'Change Report Set Name' window, type the new name and click *OK*.

Generate Report Set

1. Search or select **Report Set**
2. Select the report set to generate.
3. Tick *Contents Page* to include a contents page listing the reports selected.
4. Select and tag building/s as required and click *OK*.
5. Select output 'Printer' or 'Screen'.
6. Click *Proceed* and depending on the report make any appropriate selection.

This will generate each individual report to screen / printer / file. If you are selecting a report set with multiple reports and for several buildings the output to printer will ensure that the reports do not have to be manually directed to the printer for each report after reviewing on screen.

Reports available to be included in a Report Set

A report set may be created with any of the following combinations:

- Account Dissection Report
- Aged Balance List
- Aged Balance List (Second Debtors)
- Asset Register Report
- Bank Reconciliation Report
- Bank Statement Report
- Cash Payments Report
- Cash Payments Report Select
- Common Property Report
- Contracts Register Report
- Creditors Balance Report
- Creditors Aged Balances (Current Year only)

- Creditors Info List
- Creditors Master List
- Disputes Register Report
- Document Amendment Report
- Financial Statements (Export)
- Financial Statements (Management)
- Financial Statements (Presentation)
- Insurance Report
- Levy Register Summary
- Levy Register Summary and Lot
- Meeting Summary
- Office Bearers
- Owner Information
- Owner Information – Info Ledger Only
- Owner Information – Levy Register Only
- Owner Information – Info Only
- Plan Report
- Receipts Report
- Roll Form
- Roll List (1)
- Roll List (2)
- Security Deposit Report
- Sub-Group Update Report
- Transaction List
- Transaction List Current Month
- Transaction List Select
- Trial Balance Report
- Unpresented Cheques Report
- Unpresented Credits Report
- Update Advice
- Voting Register