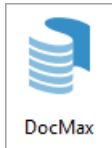


DocMax | Work Queues

Last Modified on 24/05/2024 11:29 am AEST



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

We also offer a completely free 'DocMax Basics' online course, which you can enrol in [here!](#)

Feel free to also watch this [DocMax Work Queues and Saved Searches video](#) as well.

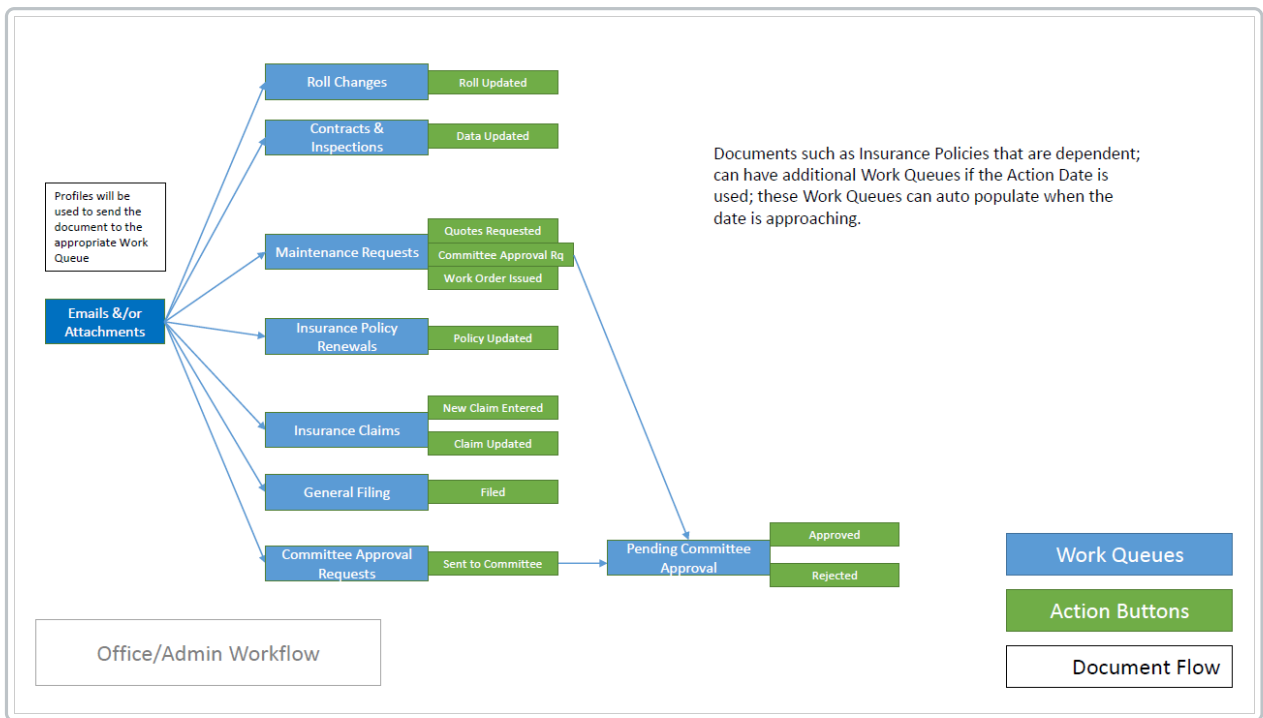
Work Queues Introduction

DocMax Work Queues have been designed to assist with common tasks and processes found in strata management offices. They do this by acting as a "folder" for particular types of documents where staff members can action them. You can determine the types of documents visible in a Work Queue by configuring them with specific restrictions. For example, you can set up one Work Queue for invoices and another for insurance certificates. You can also configure Work Queues to be accessible only to specific staff members or teams.

Documents must be added to DocMax first to appear in Work Queues.

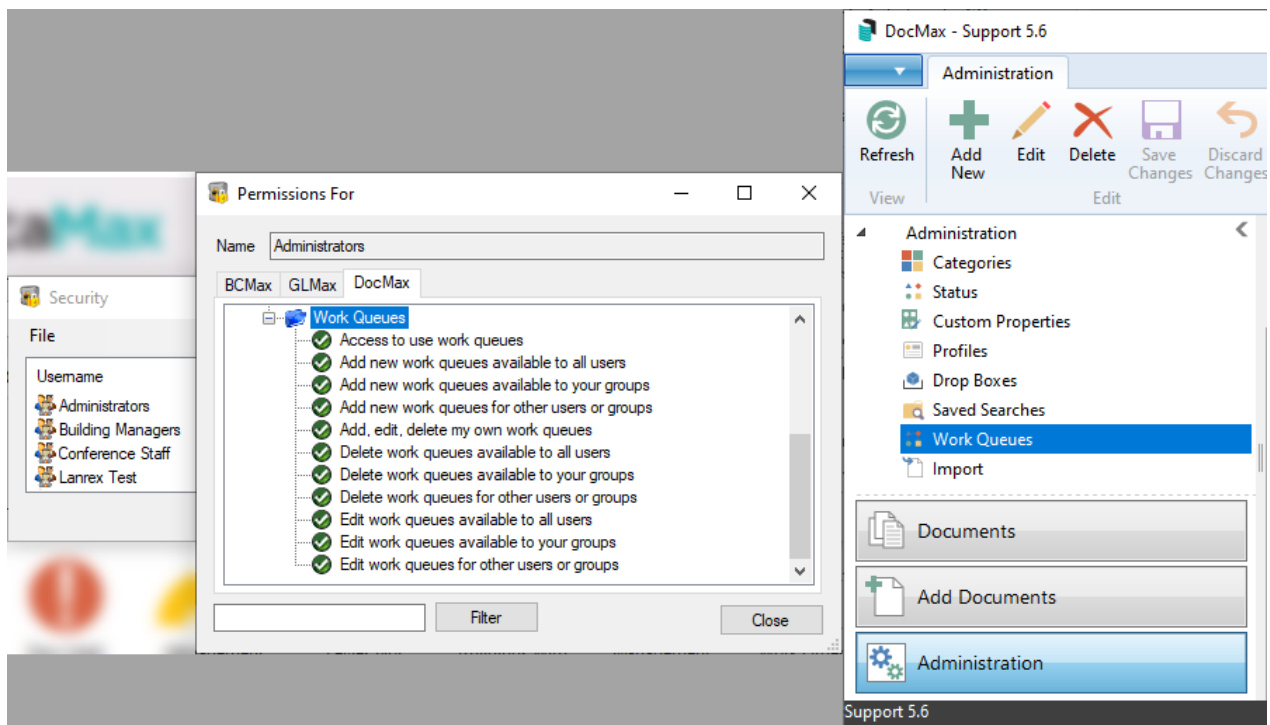
Within Work Queues you can set up customizable *Action Buttons*, that when clicked, will process the document in that specific Work Queue. The document will then *either* be moved to another Work Queue for further processing, or simply be removed from that Work Queue. See the below examples to see how different two Work Queues can be; one for processing invoices, and the other for processing various forms of correspondence.

Example Work Queues for Correspondence



Work Queues Security Setup

Creating, editing, and deleting Work Queues is done in the *Administration* screen in *DocMax*, and requires the appropriate permissions, which are configured in *Security Setup*.



Optimized Query Performance condition fields

Please note that the following conditions are recommended when completing the work queue setup. These parameters, when used, will ensure the best performance based on the query you are setting up for the work queue parameters. Note that the recommendations below are based on the optimum level of performance to the least.

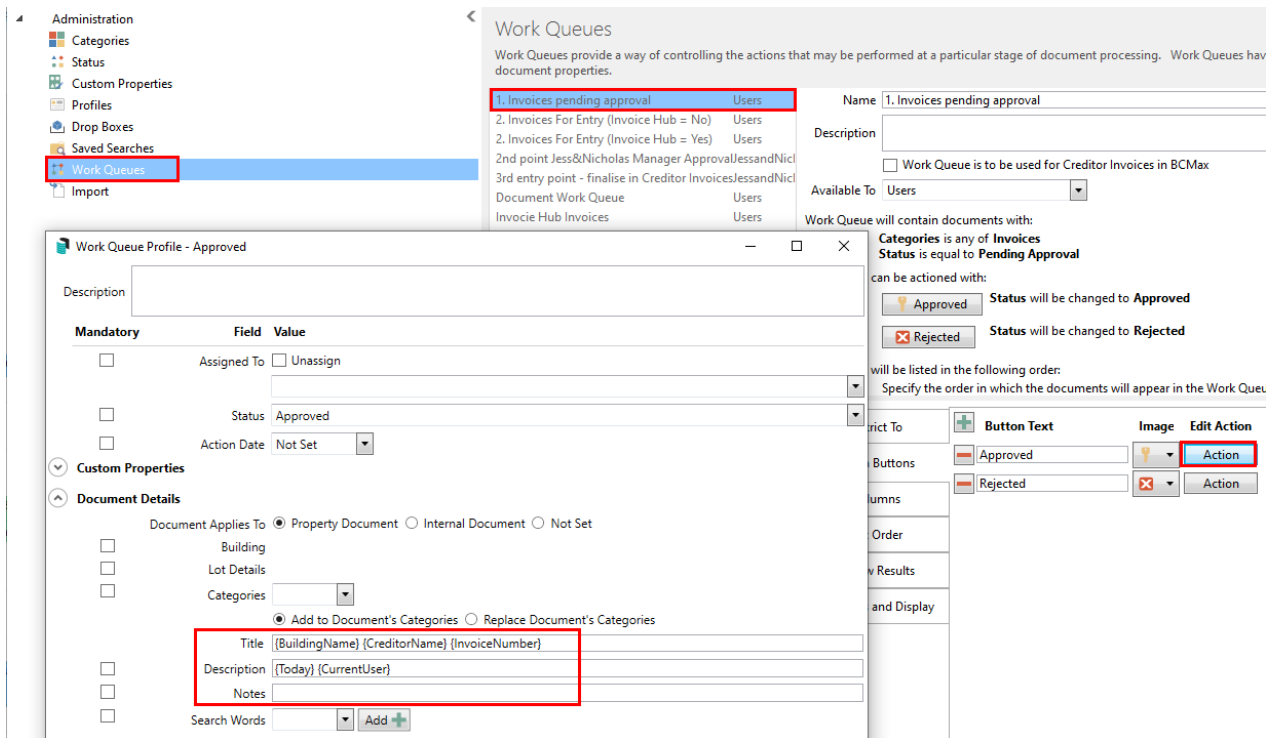
1. **Equals** is recommended as this will return an exact match when querying the database and is the fastest method of producing information.

2. **Starts With** is the second most efficient method and refers to the string's first characters. Because it looks at the starting characters, it will return a sufficient level of performance compared to option 3.

3. **Contains** is the least efficient method of querying the database as it extends the search parameters to a much broader scope, impacting performance and increasing run time when viewing the work queue.

Action Button Merge Fields

In DocMax, you can use merge fields in the *Title, Description & Notes* fields within the *Action Buttons* screen in Work Queues. By using these fields, the data will automatically populate when the *Action Button* is clicked in a Work Queue. The merge fields need to be manually typed in and can be used in the *Title, Description, and Notes*. The Current User Name merge field is also a recommended field to insert for validation of who has approved a document, and can be applied for all work queue types.



Specific fields that can be used are:

- Building Name / Company Title: {BuildingName}
- Financial Year Start: {FinancialYearStart}
- Financial Year End: {FinancialYearEnd}
- Creditor Name: {CreditorName}
- Invoice Number: {InvoiceNumber}
- Invoice Amount: {InvoiceAmount}
- Invoice Date: {InvoiceDate}
- Today - computer date: {Today}
- Current Username: {CurrentUser}
- Action Date: {ActionDate}

Formatting for Date Merge Fields

By default, any date field will be presented as DD/MM/YYYY (29/08/2022 for example). However, date fields can be formatted by manually typing some characters within the merge field as follows:

```
{InvoiceDate: yyyy-MM-dd}
```

This will result in the date being displayed as 2022-08-29.

The components that can be used in the formatting are as follows (Note that these are case-sensitive):

- yyyy = Year (e.g. 2022)
- yy = Year (e.g. 22)
- MM = Month (e.g. 08)
- MMMM = Month (e.g. August)
- dd = Day (e.g. 29)

The formats can be used independently or together, as in the following examples for the {InvoiceDate} merge field.

Field and Formatting	Display Example
{InvoiceDate: yyyy}	2022
{InvoiceDate: yyyy-MM-dd}	2022-08-29
{InvoiceDate: dd/MM/yy}	29/08/22
{InvoiceDate: MMMM yyyy}	August 2022

Add a New Work Queue

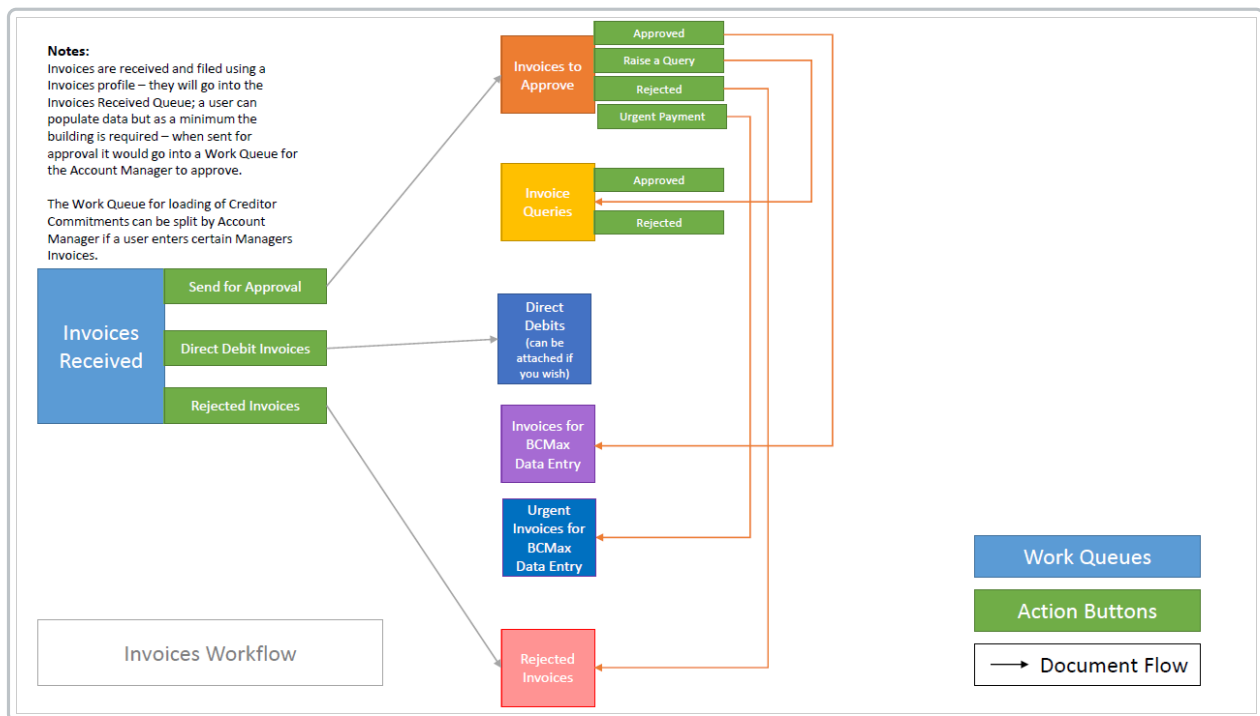
1. From the *Administration* tab, click *Work Queues*.
2. Select *Add New*.
3. Enter the *Name* for the *Work Queue*.
4. Enter a *Description* which explains the purpose of the *Work Queue*.
5. Select who the *Work Queue* will be *Available To* – this can be a particular *User / Group* or *Everyone* based on the *Security Setup* from *StrataMax*.
6. Select the *Restrict To* tab to specify the search conditions for the *Work Queue*.
 - Recommendations for restricting the following fields are as follows: *Status* and *Category*. These two fields are the simplest method of moving documents from one queue to the next or for finalising the 'Filing' status.
7. Use the drop-down arrow to show the list of fields available, or type in the field name to locate a specific field
8. The condition selection will vary depending on the field that is selected. Review available conditions to determine the most suitable
9. Enter a value, either date/text or choose from the drop-down list – this will also vary depending on the field selected
10. Repeat from step 6 to add additional fields to apply to the 'Work Queue'. At least one of the following four fields must be included:
 - *Assigned To*
 - *Status*
 - *Action Date*
 - *Categories*
11. Select the *Action Buttons* tab to set up buttons that apply specific properties to the document. These properties will update the document and move it out of the selected *Work Queue*.
12. Click '+' to setup the first button
13. Enter a name for the *Button Text* that will explain what the button does, and select an *Image* to apply to the button.
14. Click the *Action* button under the **Edit Action** column to open the action button's screen.
15. The *Description* field at the top will explain to the user what is required to allow the button to be selected. When the button is hovered over with the mouse, this will act like a tooltip.
16. Enter the fields that need to be updated. You can also add merge fields to the *Title, Description, and Notes* (see the [DocMax Merge Fields](#) section above for more info).
17. Assign any further Document Properties for entry by selecting the required fields.
18. Close the red x button when complete.
19. Review the *Work Queue* summary and add additional buttons to the *Work Queue* if required.
20. Use the 'Columns' section to 'Add' or 'Remove' the display columns
21. Change the column display order by using the up/down arrows on the right of the screen
22. Select the 'Sort Order' section to change the way the results will be sorted

23. The *Review Results* tab will allow the *Work Queue* to be reviewed and amended.
24. Select *Tab Fields and Display* to include any required expanded sections by selecting *Show this section expanded* and tagging any fields required for a *Tab Stop* and/ or *Mandatory* entry.
25. Select *Save Changes* to ensure that the *Work Queue* is saved.

Work Queues for Invoices

To streamline the end-to-end workflow of processing invoices, the **Creditor Invoices** screen can be configured to observe or monitor a DocMax *Work Queue*. Invoices can be processed through either a single *Work Queue* or a series of *Work Queues*, depending on how many *Work Queues* your office requires, which is dependent on how many staff members need to review and/or approve the invoices before they can then be saved in **Creditor Invoices**.

Here is an example of what a series of *Work Queues* could look like:

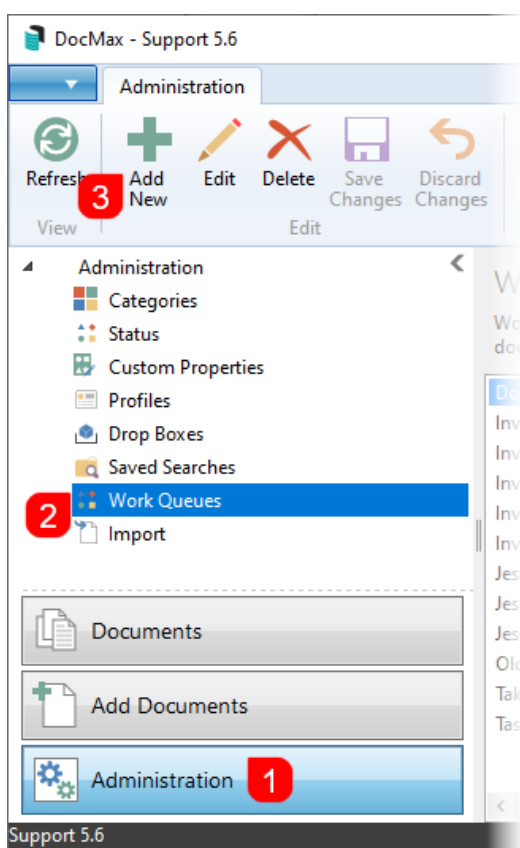


DocMax Invoice Work Queue Setup

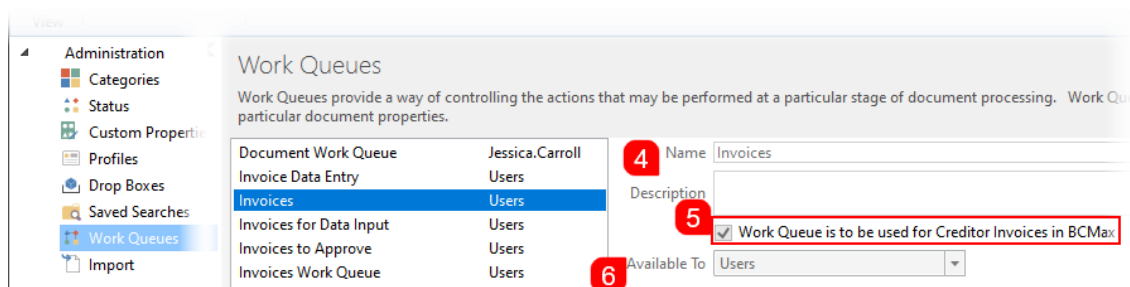
In the following steps, we are going to set up a *Work Queue* to meet our specific requirements. It will contain invoices that have just been received and added to DocMax, and will be ready for processing in the **Creditor Invoices** screen. It will also need an *Action Button* that users can click in case an invoice needs to be removed from the *Work Queue* so that it doesn't get processed and saved in the **Creditor Invoices** screen. Using merge fields such as Today - computer date: {Today} and Current Username: {CurrentUser} can assist for internal tracking as to who and what date the invoice was approved and moved through the internal approval process.

1. Open **DocMax** and access the *Administration* tab (in the bottom left).
2. Click the *Work Queues* menu (on the left).

- Click the *Add New* button in the ribbon at the top.



- Enter the *Name* for the *Work Queue* (in this example, "Invoices") and a *Description* that should explain its purpose.
- Tick the *Work Queue is to be used for Creditor Invoices in BCMAX* box. This is critical so that the *Work Queue* can later be selected in the **Creditor Invoices** screen.
- Click the *Available To* drop-down menu to select the *User* or *Group* for whom the *Work Queue* will be created. This list is driven by the *Users* and *Groups* in **Security Setup**.
 - It is NOT recommended to select "Everyone" as this will also grant access to *Groups* that may have been set up for external parties such as *Search Agents* or *Auditors*.



- We must now set up the criteria to determine which documents will appear in the *Work Queue*. You can set up multiple criteria, and each criteria uses a combination of a *Field*, *Condition*, and *Value*. Click the *Restrict To* tab, then the green '+' button to add criteria, and then use the drop-down menus to select the needed *Field*, *Condition*, and *Value*. You can add as many criteria as needed, but for a *Work Queue* for invoices, at least two criteria should be set up:

- *Categories > is any of > Invoices*
- *Status > is equal to > Received*

Restrict To	Field	Condition	Value
7	Categories	is any of	Invoices
	Status	is equal to	Received

8. Because this Work Queue will be observed by the **Creditor Invoices** screen, at least two action buttons are required. The first button will not be visible in the Work Queue screen because it is observed by the system, so when the invoice is saved in the **Creditor Invoices** screen, it will carry out the actions configured for that button. We also need to create a button, which will remove the document from the Work Queue. To make the buttons, click the *Action Buttons* tab, then the green '+' button to add each button. Then, type in the *Button Text* and click the *Image* drop-down to select an appropriate button icon. In this example, there are two buttons; one called "Finalised", and another called "Not Ready".

Restrict To	Button Text	Image	Edit Action
8	Finalised	✓	Action
	Not Ready	✗	Action

9. Now we need to determine what each button will do, so you will need to click the *Action* button for the first button ("Finalised") to open the button's configuration window, carry out steps 10, 11, and 12, then do the same for the second button ("Not Ready").
10. In the button's configuration window, we recommend typing a *Description* for the second button ("Not Ready") that explains when it should be clicked. This will display a Tooltip when the button is hovered over with the mouse. It's not necessary for the first button, as it won't be visible anyway.
11. In this example, we only need to change the *Status* field to move the invoice out of the Work Queue.
1. For the "Finalised" button, the *Status* should be changed to "Finalised". Including merge fields - Today - computer date: {Today} and Current Username: {CurrentUser} is a recommended way to allow for a date and username stamp to be inserted into the Notes field. This can be handy to refer to when and who saved the **Creditor Invoice**.
 2. For the "Not Ready" button, the *Status* should be changed to "Not Ready"
12. Click the X in the top right of the button's configuration window to close it and return to the main *Work Queues* screen.

Work Queue Profile - Not Ready 12 X

Description: This button should be clicked if the invoice is not ready to be processed any further.

10

Field	Value
Assigned To	<input type="checkbox"/> Unassign
Status	Not Ready 11
Action Date	Not Set

Custom Properties

Document Details

Document Applies To: Property Document Internal Document Not Set

Categories:

Add to Document's Categories Replace Document's Categories

Title:

Description:

Notes: [CurrentUser] (Today)

Search Words: Add +

Online Portal

File Details

13. Now you should now make sure the Work Queue will contain the right documents by selecting the *Review Results* tab, and clicking the *Review Results* button. Each of the documents displayed in the results can be double-clicked to be opened and checked.

Restrict To	Review Results 598 records displayed			
Action Buttons	Building Name	Building Number	Title	Description
Columns	LISA'S V5.6 KEEP	565656	Management Fee Invoice	
	JESS TAJ MAHAL KEEP	6543	invoice 2	
Sort Order	JESS TAJ MAHAL KEEP	6543	Management Fee Invoice	
			RTL Quote on Kerbside Drain	
Review Results	LOZ RET KEEP	32222	Radburn Plumbing Quote o	
			Q3 BAS_Report 01.01.20 to 1	
Tab Fields and Display			Pipeworks	
	STAGED DEVELOPMENT	158158	Notice of Committee Meeti	
			Management Fee Invoice	

13

14. As this is a Work Queue for invoices specifically, we recommend selecting the *Tab Fields and Display* tab and ticking *Show this section expanded* in the **Documents Details** and **Invoice Details** sections. This saves time when reviewing the details of the invoice.

Restrict To	Mandatory	Tab Stop	Field
Action Buttons	<input type="checkbox"/>	<input type="checkbox"/>	Closed Sections
Columns	<input type="checkbox"/>	<input type="checkbox"/>	Assigned To
Sort Order	<input type="checkbox"/>	<input type="checkbox"/>	Status
Review Results	<input type="checkbox"/>	<input type="checkbox"/>	Action Date
	<input type="button" value="v"/> Custom Properties		
	<input type="button" value="^"/> Document Details		
Tab Fields and Display			<input checked="" type="checkbox"/> Show this section expanded
	<input type="checkbox"/>	<input type="checkbox"/>	Document Applies To
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Building
	<input type="checkbox"/>	<input type="checkbox"/>	Lot Details
	<input type="checkbox"/>	<input type="checkbox"/>	Categories
	<input type="checkbox"/>	<input type="checkbox"/>	Title
	<input type="checkbox"/>	<input type="checkbox"/>	Description
	<input type="checkbox"/>	<input type="checkbox"/>	Notes
	<input type="checkbox"/>	<input type="checkbox"/>	Search Words
	<input type="button" value="v"/> Online Portal		
	<input type="button" value="^"/> Invoice Details		
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Creditor
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Date
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Number
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Invoice Amount
	Invoice Items		
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Expense Account
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Details
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Amount
		<input checked="" type="checkbox"/>	GST
			<input checked="" type="checkbox"/> Show this section expanded

15. Now is a good time to review the summary of the Work Queue. Specifically, the "Work Queue will contain documents with" and "Documents can be actioned with" sections.

Name

Description

Work Queue is to be used for Creditor Invoices in BCMAX

Available To

Work Queue will contain documents with:

Categories is any of Invoices

Status is equal to Received

Documents can be actioned with:

Status will be changed to Finalised

Status will be changed to Not Ready

Documents will be listed in the following order:

Original File Name - Z to A

16. When ready, click the *Save Changes* buttons in the top ribbon, and proceed to configure **Creditor Invoices** (next section below).

Creditor Invoices Work Queue Setup

Strictly speaking, only two settings are required in **Creditor Invoices** so that Work Queues can function. See [Document Attachment](#) for more information on the other settings.

1. Open **Creditor Invoices**, then under *File > Configure*, scroll down the window to the "Document Attachment" section.
2. Click the *Invoice Document Display Position* drop-down menu and select "Right" ("Bottom" could be selected as well, but it's generally not recommended).
3. Click the *Creditor Invoice Work Queue* drop-down menu, and select the Work Queue that you set up in **DocMax**, for example "Invoices".

Document Attachment

Automatically start work queue when Creditor Commitments is opened

Invoice Document Display Position: Right

Creditor Invoice Work Queue: Invoices

Require Invoice Document For Each Creditor Commitment

Delete Original Document File On Save

Close

Edit a Work Queue

1. From the **Administration** tab.
2. Click *Work Queues* and select the required queue for editing / select *Edit*.
3. Amend the required section of the *Work Queue*.
4. Review the *Tab Fields and Display* and ensure that the fields of information are set to expand where relevant and any *Tab Stops* and *Mandatory* fields are tagged.
5. Use the *Review Results* to check the updates are correct.
6. Select *Save Changes* to update the *Work Queue*.

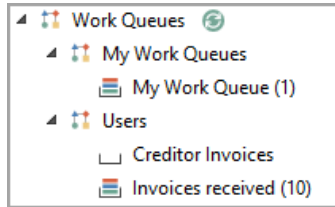
Delete a Work Queue

Once a *Work Queue* is deleted, it cannot be retrieved, so it would need to be set up again if necessary.

1. From the **Administration** tab.
2. Click *Work Queues* and select the required work queue.
3. Click the *Delete* button (big red cross) on the top ribbon.
4. When prompted, select *Yes* or *No* to delete the selected *Work Queue*.

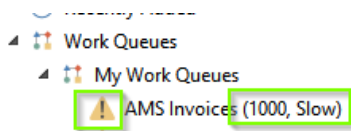
Using Work Queues

The number of Work Queues and the names of those Work Queues will vary depending on which security group you are a member of. You can also set up Work Queues just for yourself if you have been granted the 'Allow' permission to 'Add, edit, delete my work queues' in the **Security Setup** menu under the *DocMax* tab (see the 'Work Queues Security Setup' section above in this article).





The frequency at which Work Queues will update is a minimum of 5 minutes (configured in *DocMax Settings*). However, you can refresh your Work Queues by clicking the *Refresh* button directly in the Work Queues.

An alert icon will be displayed next to the Work Queue if the system detects slow performance when running the query. If there are more than 1000 documents, the system will truncate the count to 1000 to reduce the impact on resources and refresh every 5 mins. The superseded document count will not be displayed. This change applies to Work Queue searches only.



This change is scheduler-driven and must be activated by our Development Team upon request. Please email support@stratamax.com.au if you would like to utilise this feature.

The appearance of work queues and work queue folders will change depending on whether documents are waiting in the queue.

- When empty, an empty tray icon will be next to the Work Queue name: 
- When the Work Queue has documents in it, a full tray icon will be next to the Work Queue name: 

Document History

As documents are passed through work queues and various stages of approval, each document has a history with date and time stamps included. This can be helpful to see who may have approved a document/invoice and on what date. The alternative is to use the Current Username and Today merge fields within the action button, which will display this information at the interface level. The document history is also available.

1. Locate the document in **DocMax**.
2. Either right-click on the document or use the ribbon to *View History*.
3. All document and property updates will be included with dates and username information.

Document management | Open | Delete Document | Append other Document | Append External File | Disbursements | Print | Email | **View History** | Copy to Buildings | Create PDF Report | Create Excel Report | Export Documents

Selected Document | Reporting

Invoices

Extracted Text contains
Building Name is equal to
Building Number is equal to
Creditor is equal to

[Refresh](#) 1 record displayed

Expiry Date	Added Date
	12/10/2017

Invoice Amount

View Document History

Thu 12 Oct 2017
22:50:34 Created From Building Transfer craig,

Thu 07 Feb 2019
09:06:50 Added Transaction Reference "D0000676" craig,
09:06:50 Added Invoice Details "Garden 2/10" craig,
09:06:50 Added Expense Account Code "1502" craig,
09:06:50 Added Invoice Line Amount "8.60" craig,
09:06:50 Added Invoice Line No GST "False" craig,

Fri 24 May 2024
10:53:17 Added Building_Number "18651" Jessic
10:53:17 Added Invoice Number "12345" Jessic
10:53:17 Added Invoice Date "01/05/2023" Jessic
10:53:17 Changed Status from "Received" to "Not Ready" Jessic
10:53:17 Added Creditor Account Code "08200165" Jessic
10:54:11 Changed Status from "Not Ready" to "Approved" Jessic

Close

- Append other Document
- Append External File
- Print
- Email
- View History**
- Copy to Buildings
- Create PDF Report
- Create Excel Report