DocMax | Online Portal Uploads

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This article covers the *Online Portal Uploads* sections in ***DocMax***. This is where documents are placed while they are awaiting automated synchronisation. This can be for the upload of new documents, the removal of pending documents, as well as the update of documents.

However, before any documents can be uploaded, the *Document Groups* must be set up on the StrataMax Portal itself. To learn how to set these up, check out the *StrataMax Portal | Report & Documents* article.

Synchronisation between DocMax and the StrataMax occurs automatically, and documents should be available on the Portal within a few minutes. However, when uploading documents to multiple building at the same time, a small delay may occur.

Custom Portal content links, broken uploaded-content links, finalised document changes and missing export fields may require investigation and assistance by the StrataMax Support Team, or product feedback because the correct action depends on setup and document history.

We also offer a completely free 'DocMax Basics' online course, which is available here. Please see the StrataMax Online Courses page for more details, including the coupon code required to enrol for free.

DocMax | StrataMax Portal Documents Video

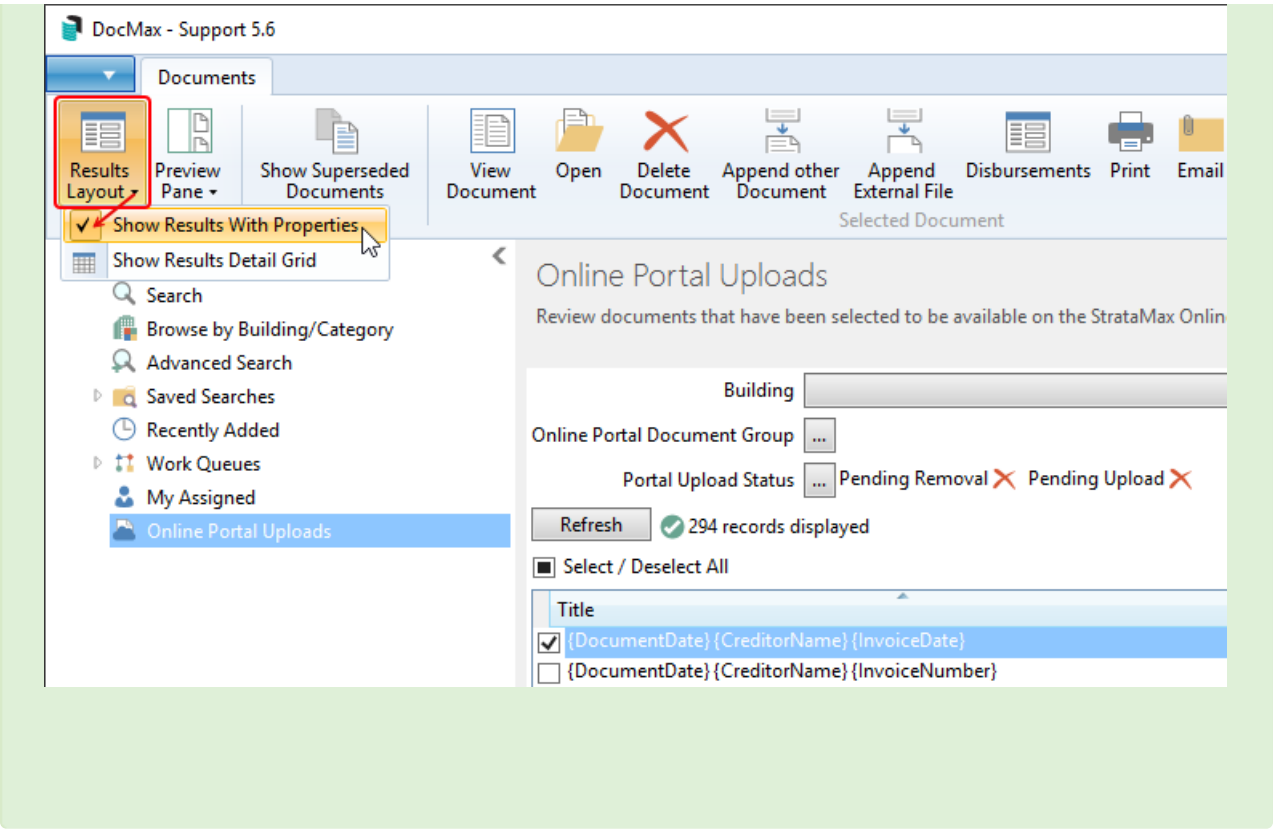
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DocMax | Online Portal Upload Overview

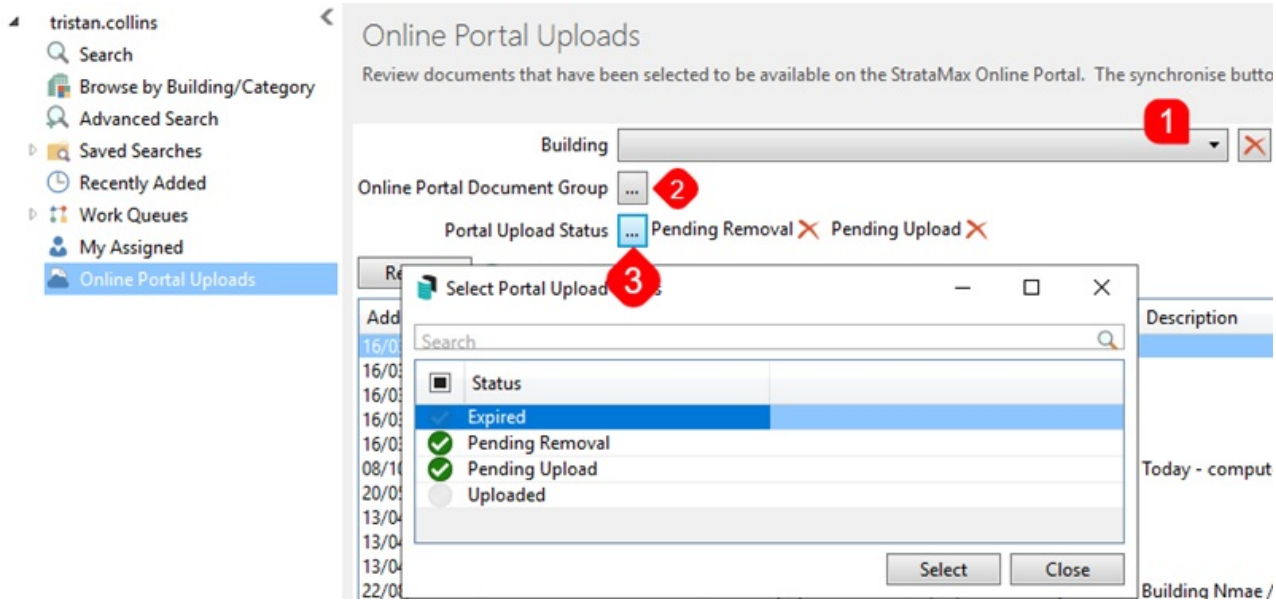
This section of the article is designed to provide StrataMax users with a brief overview of the Online Portal Uploads screen in DocMax, covering filters, views, and other recommendations.

When opening the *Online Portal Uploads* screen, there are a number of filters that can be applied so that only certain specific documents are displayed.

When viewing the *Online Portal Uploads* screen, it is recommended to use the *Results Layout* called 'Show Results Detail Grid', which is the default. This provides a lot more information about the filtered results in one, easy-to-read table.



The columns displayed in this screen are hard coded and cannot be changed. For a more advanced search with a customised view, it is recommended to use a *DocMax Advanced Search*.



1. **Building:** Use this drop-down menu to display the *Building Selector* with accompanying filters, to narrow down the displayed documents to a specific building. Only one building can be selected at a time. Click the red 'X' button to remove the building filter.
2. **Online Portal Document Group:** Click this ellipsis *[...]* button to display the full list of *Portal*

Document Groups. Select one or multiple *Document Groups* by tagging them and clicking the *Select* button.

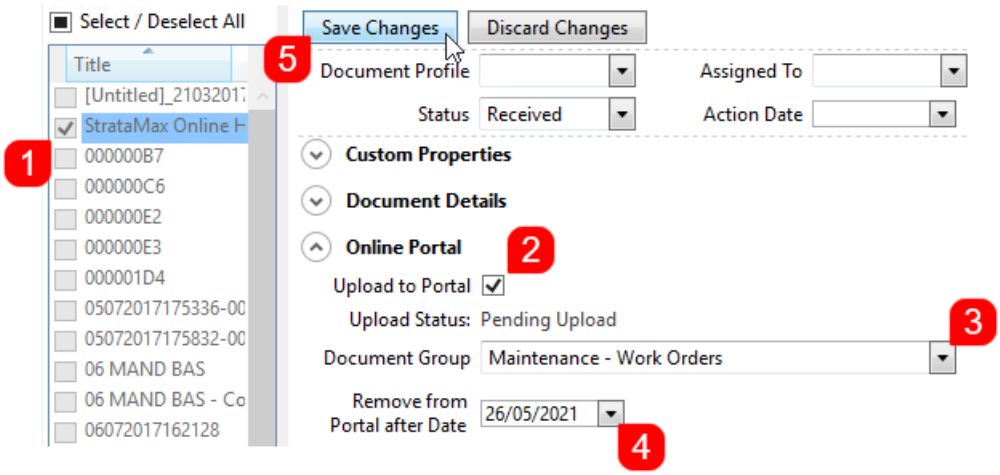
3. **Portal Upload Status:** When opening the *Online Portal Uploads* screen, the two statuses that are selected by default are *'Pending Removal'* and *'Pending Upload'.* However, these can be changed by clicking the ellipsis *[...]* button. Click the red 'X' button to remove that filter option.
    - Pending Removal: These are documents will be removed from the Portal upon the next synchronisation.
    - Pending Upload: These are documents will be uploaded to the Portal upon the next synchronisation.
    - Expired: These are documents that have a *'Remove From Portal After'* date that has already passed.
    - Uploaded: These are documents that are already uploaded to the Portal.

DocMax | Upload a Document to the StrataMax Portal

This section of the article contains steps required to upload a single document to the StrataMax Portal. This is only applicable to documents that need to be uploaded to *Document Groups* on the StrataMax Portal, and does not apply to automated reports that are displayed in the *Report Groups*. To learn more, please refer to the *StrataMax Portal | Report & Documents* article.

When uploading documents to the Portal, it is recommended to use the *Results Layout* (selected in the top left of the DocMax ribbon) called *'Show Results With Properties'* as this is the most efficient view to use to quickly switch between documents and display the **Online Portal** section.

1. In ***DocMax***, locate and select the document to display its properties.
2. Expand the **Online Portal** section and tick the *Upload to Portal* tick box.
3. Select the *Document Group* from the drop-down menu.
    - These *Document Groups* are set up on the *StrataMax Portal*.
4. Select a specific date or expiry period by clicking the *Remove from Portal after Date* drop-down menu.
5. Click the Save Changes button.



6. This will place the document in the *Online Portal Uploads* section of DocMax with a *Portal Upload Status* of *'Pending Upload'*.
7. The document will be uploaded automatically when the scheduled nightly building upload task has completed.

DocMax | Upload Multiple Documents to the StrataMax Portal

This section of the article covers how to upload multiple documents to the StrataMax Portal simultaneously. This is only applicable to documents that need to be uploaded to *Document Groups* on the StrataMax Portal, and does not apply to automated reports that are displayed in the *Report Groups*. To learn more, please refer to the *StrataMax Portal | Report & Documents* article.

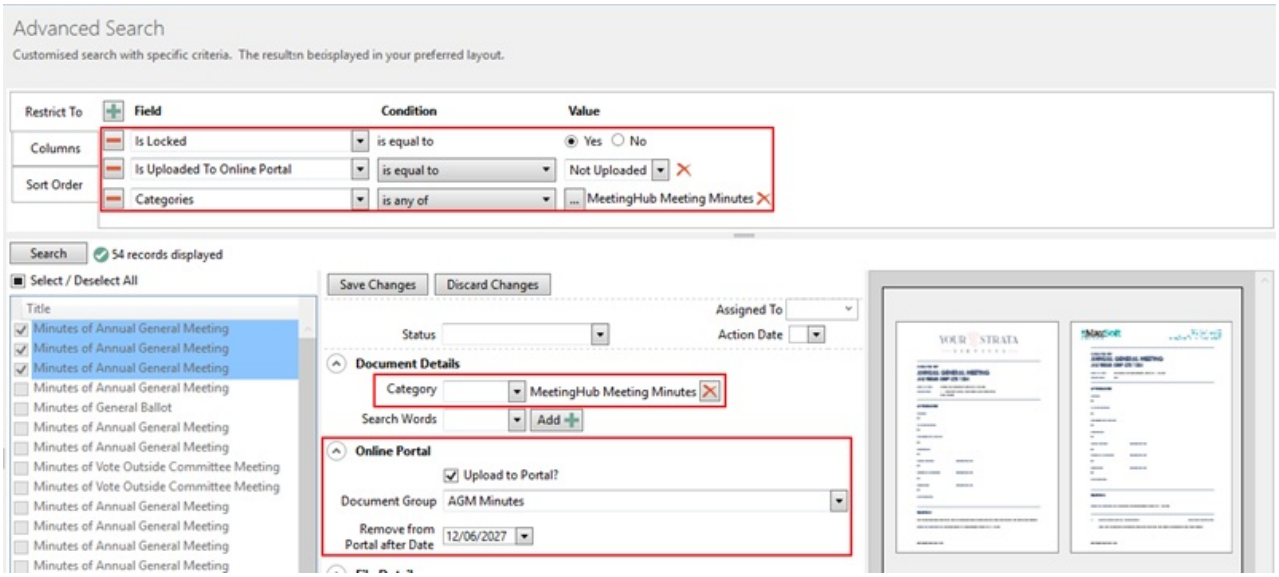
> It's necessary to use the *Results Layout* called *Show Results With Properties'* (selected in the top left of the DocMax ribbon) in order to select multiple documents to upload.

In most cases it is recommended to set up a *DocMax Advanced Search* to identify and select multiple documents for each *Document Group.* This is because only one *Document Group* can be selected at a time.

The *Remove From Portal after Date* should also be considered, as this will vary depending on the type of documents being uploaded.

Locked documents can be updated with the *Document Locked* box unticked under the ***File Details*** section. Create a *DocMax Advanced Search*, include locked documents in the search results. To do this, include a filter with the **Field** *'Is Locked'*, and the **Condition** will default to *'is equal to'*, and the **Value** set to *'Yes'*. Multi select the documents and remove the *Document is Locked* tick.

Logically, documents that are already uploaded to the Portal would want to be excluded from the search results as well, so the *DocMax Advanced Search*, should also include a filter with the **Field** *'Is Uploaded To Online Portal'*, and the *Condition* to *'is equal to'*, and the **Value** to *'Not Uploaded'*.



DocMax | Removing Documents from the StrataMax Portal

Synchronisation between DocMax and the StrataMax occurs automatically, and documents should be available on the Portal within a few minutes. However, when uploading documents to multiple building at the same time, a small delay may occur.

1. In ***DocMax***, click the *Online Portal Uploads* menu in the navigation pane on the left.
2. Use the *Building*, *Online Portal Document Group*, and *Portal Upload Status* filters to narrow the list if required.
3. Once the document has been located, double-click it or right-click it and select *View Document.*
    - The document will display in a separate window, with its properties.
4. Expand the **Online Portal** section and untick the *Upload to Portal* tick box.
5. Click the *Save and Close* (3.5" Floppy Disk) icon in the ribbon at the top.
6. This will change the document status to *'Pending Removal.'*
7. The document will be automatically removed when the scheduled nightly building upload task completes.

DocMax | Updating Document Titles displayed on the StrataMax Portal

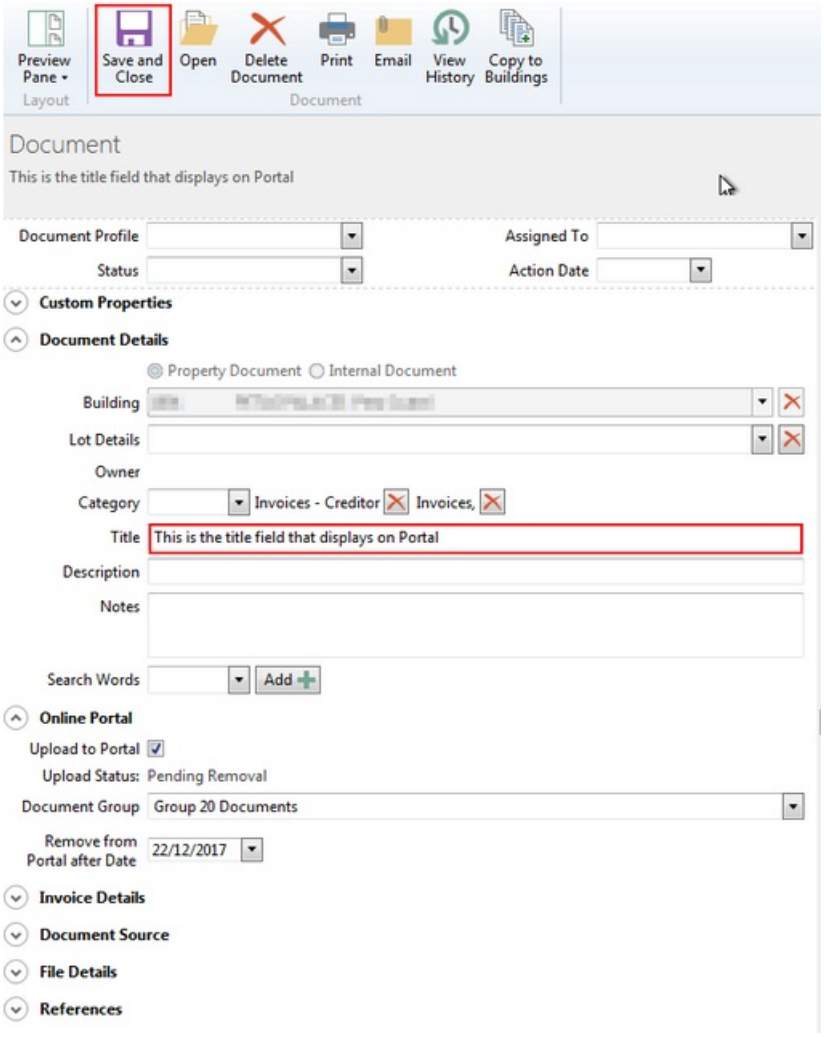
Synchronisation between DocMax and the StrataMax occurs automatically, and documents should be available on the Portal within a few minutes. However, when uploading documents to multiple building at the same time, a small delay may occur.

In the event that a Portal document needs a change to title, follow the below steps:

1. In ***DocMax***, click the *Online Portal Uploads* menu in the navigation pane on the left.
2. Use the *Building*, *Online Portal Document Group*, and *Portal Upload Status* filters to narrow the list if required.
3. Once the document has been located, double-click it or right-click it and select *View Document.*
4. Update the *Title* field.

The **Online Portal** section can also be updated at this time e.g. *Remove from Portal Date*, *Document Group* if required. The document can also be split if needed and re-saved to create separate documents at this point.

5. Click *Save and Close* to update the information.

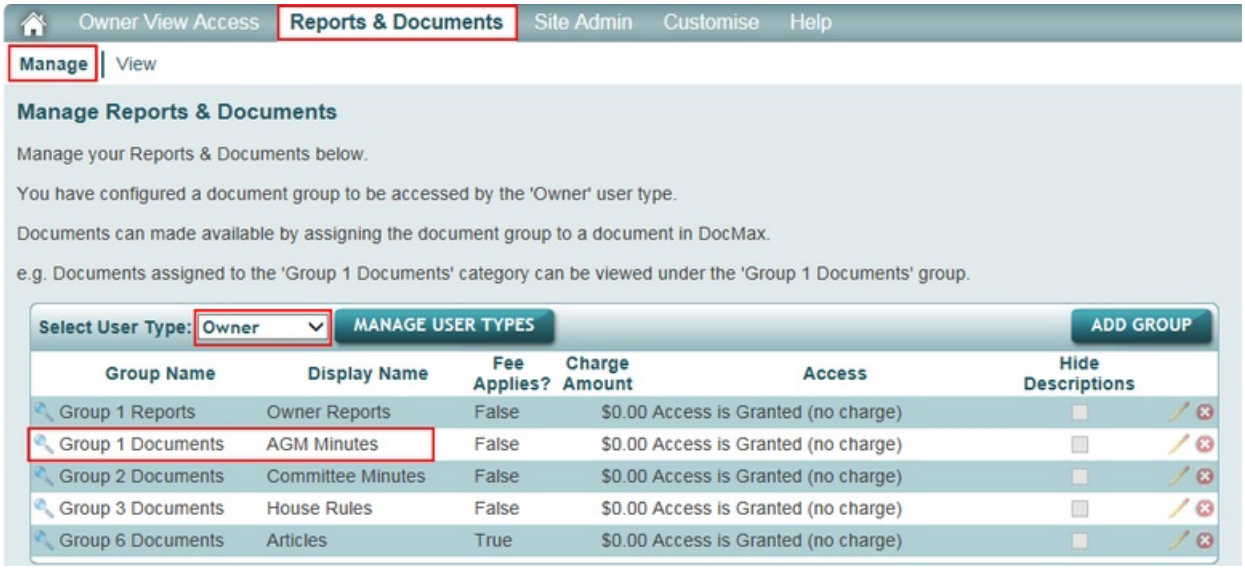


6. The document will be synchronised automatically within a few minutes.

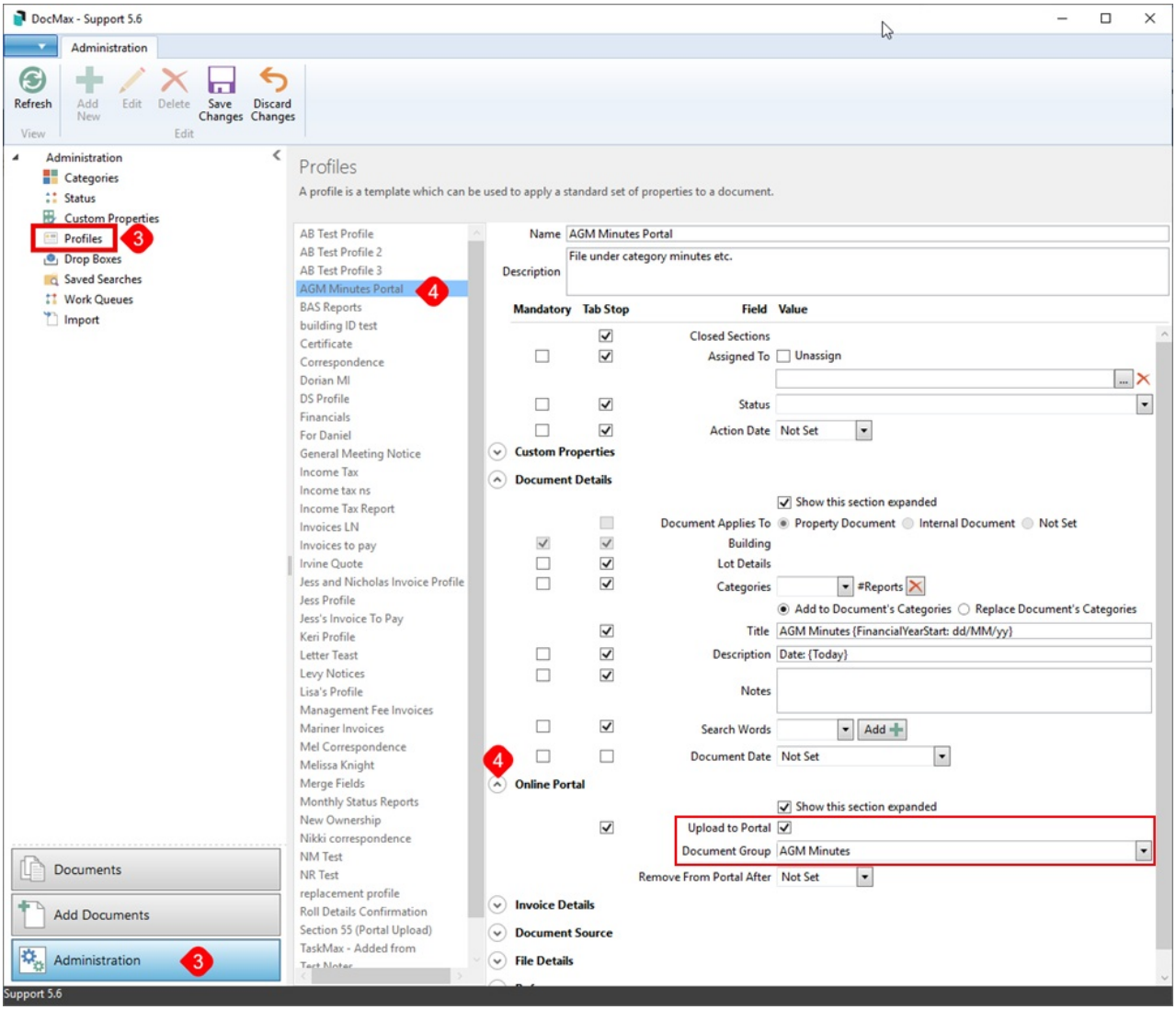
DocMax | StrataMax Portal Document Groups and Display

Once *Document Groups* have been set up on the *StrataMax Portal* the *Display Name* will synchronise with ***DocMax*** and will replace the default 'Group [number] Documents' title in the *Document Group* drop-down menu. At this point *DocMax Profiles* can be set up and configured with a specific Document Group. This section describes how to check what is configured in *DocMax Profiles* compared to what is set up in *Document Groups* on the StrataMax Portal.

1. Once logged into the StrataMax Portal as an administrator, hover the mouse cursor over the *Reports and Documents* tab, then click the *Manage* link.
2. In the *Select User Type* drop-down menu, select the required user type, then note the *Group Name* and *Display Name.*



3. In ***DocMax***, click the *Administration* button in the bottom left, then click the *Profiles* menu in the navigation pane on the left.
4. Select the required profile and expand the **Online Portal** section to see the *Document Group* field matches what is currently available via the StrataMax Portal.



Portal Upload Troubleshooting

Use this section when a DocMax document is showing on the Portal unexpectedly, has not appeared yet, is still pending upload or needs to be removed.

1. In ***DocMax***, click the *Online Portal Uploads* menu in the navigation pane on the left.
2. Use the *Building*, *Online Portal Document Group* and *Portal Upload Status* filters to locate the document.
3. Expand the **Online Portal** section and tick the *Upload to Portal* tick box.
4. Untick *Upload to Portal* if the document should be removed.
5. Click *Save and Close* to update the information.
6. The document will be synchronised automatically within a few minutes.