DocMax | Online Portal Uploads

This articles covers the *Online Portal Uploads* sections in **DocMax**. This is where documents are placed waiting to be synchronised. This can be for the upload of new documents, removal of pending documents, as well as update of documents.

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

Please note that as of *StrataMax version 5.6.112*, the *Synchronise All* and *Synchronise Selection* buttons are no longer available. The synchronisation happens automatically and documents should be available on the Portal within a few minutes. Note, however, if on the rare occasion there is a delay, it will be because there are multiple building uploads happening at the same time.

We also offer a completely free 'DocMax Basics' online course, which you can enrol in here! Please see the StrataMax Online Courses page for more details, including the coupon code required to enrol for free.
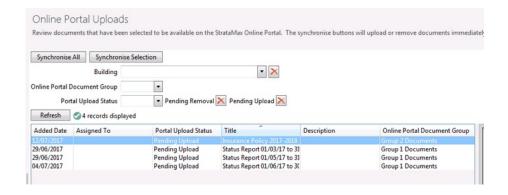
DocMax Portal Documents Video

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Pending Upload and Pending Removal Status

The synchronisation happens automatically and documents should be available on the Portal within a few minutes. Note, however, if on the rare occasion there is a delay, it will be because there are multiple building uploads happening at the same time. Before *StrataMax version 5.6.112* there was also an option to manually synchronise documents with the push of a button, as outlined in this article.

When opening the *Online Portal Uploads* area, there are two default statuses that are defined: *'Pending Removal'* and *'Pending Upload'*. These are the documents that will be uploaded or removed on the automated synchronisation schedule.
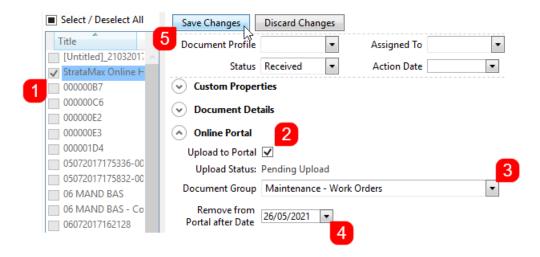
1. Select *Online Portal Uploads.*
2. Use the *Portal Upload Status* drop-down menu to filter the list, or if required remove a status by clicking its delete button (red cross).
3. Click *Refresh* to display the new results.

Adding Documents to the StrataMax Portal

The synchronisation happens automatically and documents should be available on the Portal within a few minutes. Note, however, if on the rare occasion there is a delay, it will be because there are multiple building uploads happening at the same time. Before *StrataMax version 5.6.112* there was also an option to manually synchronise documents with the push of a button, as outlined in this article.

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.

Removing Documents from the StrataMax Portal

The synchronisation happens automatically and documents should be available on the Portal within a few minutes. Note, however, if on the rare occasion there is a delay, it will be because there are multiple building uploads happening at the same time. Before *StrataMax version 5.6.112* there was also an option to manually synchronise documents with the push of a button, as outlined in this article.

1. In **DocMax**, open the *Online Portal Uploads* section.
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 removed automatically when the scheduled nightly building upload task has been completed.

Synchronise All or Synchronise Selection

The synchronisation happens automatically; documents should be available on the portal within a few minutes. Note, however, that if there is a delay on rare occasions, it will be because multiple building uploads are happening simultaneously.

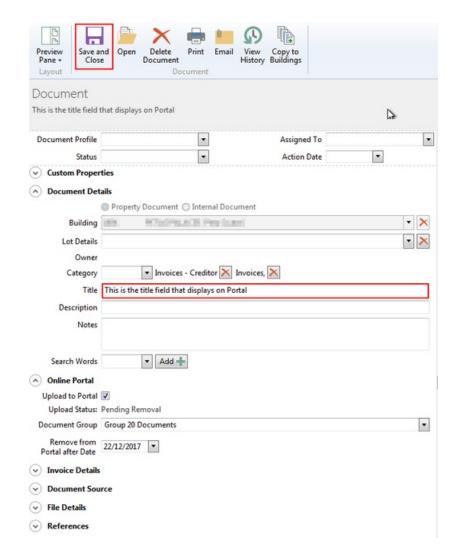# Updating Document Titles displayed on the StrataMax Portal

The synchronisation happens automatically and documents should be available on the Portal within a few minutes. Note, however, if on the rare occasion there is a delay, it will be because there are multiple building uploads happening at the same time. Before *StrataMax version 5.6.112* there was also an option to manually synchronise documents with the push of a button, as outlined in this article.

Documents that are available online may need a title change if requested from an Owner/ Committee Member, or there may be a requirement internally to change the the document title. This can be done simply from the Online Portal Uploads area in DocMax.

1. Open the *Online Portal Uploads* section of **DocMax**.
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 when the scheduled nightly building upload task has completed.

StrataMax Portal Document Groups and Display

The StrataMax Portal *Document Groups* that are configured will display their description in **DocMax**. This works specifically for the *Owners Reports* and *Documents* that have been set up on the *StrataMax Portal*. These steps describe how to review and compare what is configured in **DocMax** *Profiles* versus what is set up on the StrataMax Portal.

1. Once logged into the StrataMax Portal as an Administrator, go to the *Reports and Documents* tab, then *Manage*.
2. In the *Select User Type* drop-down menu, select *Owner* and note the *Group Name* and *Display Name*.

3. In **DocMax**, click the *Administration* menu, then select *Profiles.*

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.