

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.

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

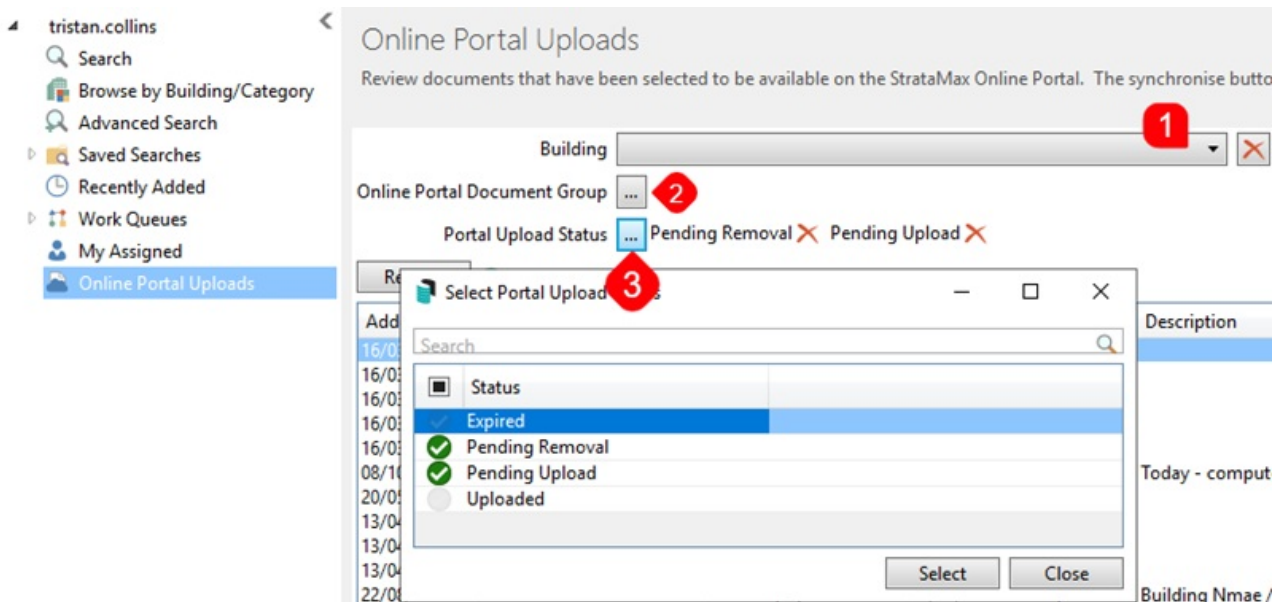
Your browser does not support HTML5 video.

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 Upload* 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.

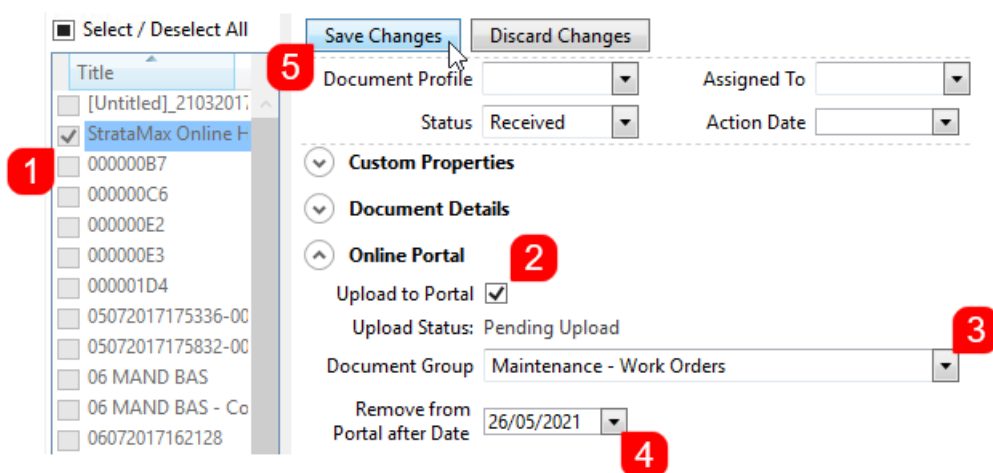
DocMax | Upload a Document to the StrataMax Portal

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 Dated* 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

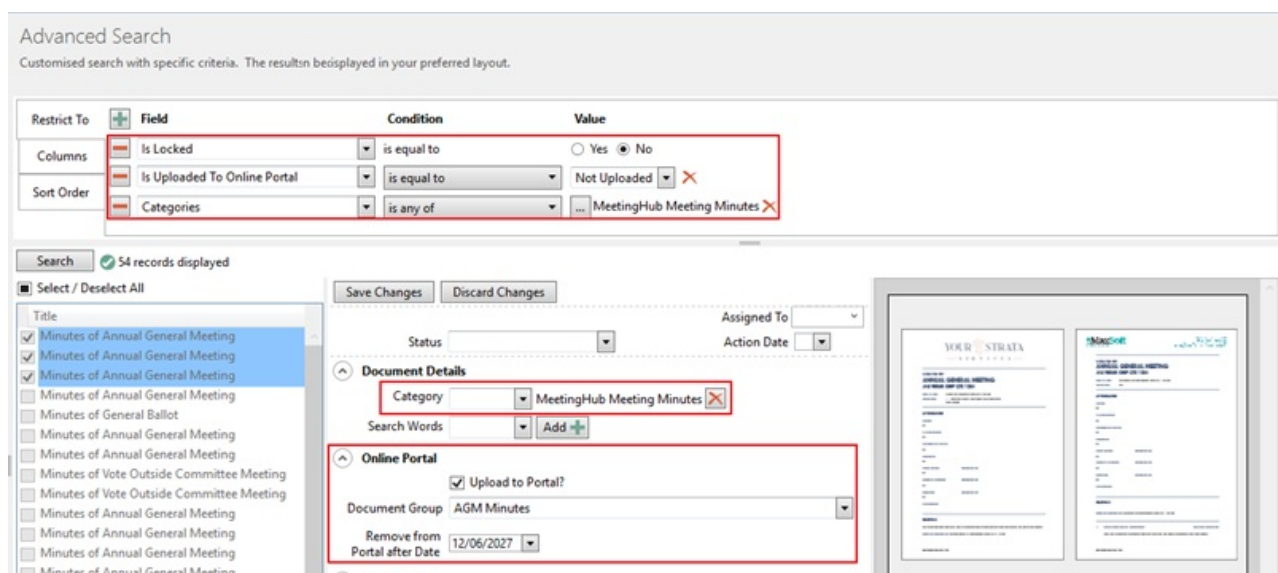
time.

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

Also, locked documents can only be updated or uploaded to the portal one at a time. Specifically, documents with the *Document Locked* box ticked under the **File Details** section. If these are included when selecting multiple documents, a yellow warning will be displayed advising that *one or more selected documents are finalised and cannot be updated*, and it will prevent any changes from being made - i.e. ticking the *Upload to Portal* box.

To work around this, there are two options. Either identify the locked documents and remove the tick from the *Document Locked* box, one document at a time and then perform the search and upload. Or, in the *DocMax Advanced Search*, exclude locked documents from 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 *'No'*.

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.

The screenshot shows the 'Document' configuration page in the StrataMax Portal. At the top, there is a toolbar with icons for 'Preview Pane', 'Save and Close' (highlighted with a red box), 'Open', 'Delete Document', 'Print', 'Email', 'View History', and 'Copy to Buildings'. Below the toolbar, the page is titled 'Document' and includes a subtitle: 'This is the title field that displays on Portal'. The form contains several sections: 'Document Profile' with dropdowns for 'Document Profile', 'Assigned To', 'Status', and 'Action Date'; 'Custom Properties' (collapsed); 'Document Details' (expanded) with radio buttons for 'Property Document' and 'Internal Document', and fields for 'Building', 'Lot Details', 'Owner', 'Category' (with 'Invoices - Creditor' and 'Invoices' selected), 'Title' (highlighted with a red box and containing 'This is the title field that displays on Portal'), 'Description', and 'Notes'; 'Search Words' with an 'Add +' button; 'Online Portal' with a checked 'Upload to Portal' checkbox, 'Upload Status: Pending Removal', 'Document Group' dropdown (set to 'Group 20 Documents'), and 'Remove from Portal after Date' dropdown (set to '22/12/2017'); and finally, collapsed sections for 'Invoice Details', 'Document Source', 'File Details', and 'References'.

6. The document will be synchronised automatically when the scheduled nightly building upload task has completed.

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 *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*.

Owner View Access **Reports & Documents** Site Admin Customise Help

Manage | View

Manage Reports & Documents

Manage your Reports & Documents below.

You have configured a document group to be accessed by the 'Owner' user type.

Documents can be made available by assigning the document group to a document in DocMax.

e.g. Documents assigned to the 'Group 1 Documents' category can be viewed under the 'Group 1 Documents' group.

Select User Type: **Owner** **MANAGE USER TYPES** **ADD GROUP**

Group Name	Display Name	Fee Applies?	Charge Amount	Access	Hide Descriptions
Group 1 Reports	Owner Reports	False	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>
Group 1 Documents	AGM Minutes	False	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>
Group 2 Documents	Committee Minutes	False	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>
Group 3 Documents	House Rules	False	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>
Group 6 Documents	Articles	True	\$0.00	Access is Granted (no charge)	<input type="checkbox"/>

- In **DocMax**, click the **Administration** button in the bottom left, then click the **Profiles** menu in the navigation pane on the left.
- 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.

DocMax - Support 5.6

Administration

Refresh Add New Edit Delete Save Changes Discard Changes

Administration

- Categories
- Status
- Custom Properties
- Profiles** 3
- Drop Boxes
- Saved Searches
- Work Queues
- Import

Documents

Add Documents

Administration 3

Support 5.6

Profiles

A profile is a template which can be used to apply a standard set of properties to a document.

AB Test Profile
AB Test Profile 2
AB Test Profile 3
AGM Minutes Portal 4
BAS Reports
building ID test
Certificate
Correspondence
Dorian MI
DS Profile
Financials
For Daniel
General Meeting Notice
Income Tax
Income tax ns
Income Tax Report
Invoices LN
Invoices to pay
Invine Quote
Jess and Nicholas Invoice Profile
Jess Profile
Jess's Invoice To Pay
Keri Profile
Letter Teast
Levy Notices
Lisa's Profile
Management Fee Invoices
Mariner Invoices
Mel Correspondence
Melissa Knight
Merge Fields
Monthly Status Reports
New Ownership
Nikki correspondence
NM Test
NR Test
replacement profile
Roll Details: Confirmation
Section 55 (Portal Upload)
TaskMax - Added from
Test Note

Name: AGM Minutes Portal
Description: File under category minutes etc.

Mandatory	Tab Stop	Field	Value
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Closed Sections	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned To	Unassign
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Status	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Action Date	Not Set

Custom Properties

Document Details

Show this section expanded

Document Applies To: Property Document Internal Document Not Set

Building:

Lot Details:

Categories: #Reports

Add to Document's Categories Replace Document's Categories

Title: AGM Minutes (FinancialYearStart: dd/MM/yy)

Description: Date: (Today)

Notes:

Search Words: Add

Document Date: Not Set

Online Portal

Show this section expanded

Upload to Portal:

Document Group: AGM Minutes

Remove From Portal After: Not Set

Invoice Details

Document Source

File Details

DocMax | Locked Documents

Documents that are system generated by StrataMax are finalised and cannot be updated in bulk, including ticking the *Upload to Portal* tick box. To check this, review the *Added From* field under the **Document Source** section. In this instance a yellow warning will state *one or more selected documents are finalised and cannot be updated*.

These documents can still be uploaded one by one, using the standard method of uploading a document (see above in this article).

Advanced Search

One or more selected documents are finalised and cannot be updated

Restrict To	Field	Condition	Value
Columns	Is Locked	is equal to	<input checked="" type="radio"/> Yes <input type="radio"/> No
Sort Order			

Search 27 records displayed

Select / Deselect All

Title
<input checked="" type="checkbox"/> Status Report
<input checked="" type="checkbox"/> Status Report
<input checked="" type="checkbox"/> Status Report
<input checked="" type="checkbox"/> Pest Control - Generic
<input checked="" type="checkbox"/> Status Report
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice
<input checked="" type="checkbox"/> Levy Notice

Save Changes Discard Changes

Assigned To

Status Action Date

Document Details

Category

Search Words Add

Online Portal

Unavailable - Not all documents have a building selected.

Upload to Portal?

Document Group

Remove from Portal after Date

