

# DocMax | Online Portal Uploads

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This article 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!](#)

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## DocMax Portal Documents Video

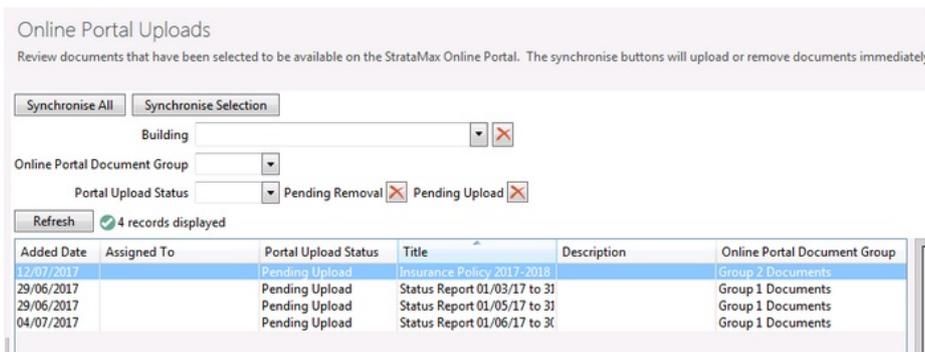
Your browser does not support HTML5 video.

## 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.



Online Portal Uploads

Review documents that have been selected to be available on the StrataMax Online Portal. The synchronise buttons will upload or remove documents immediately.

Synchronise All Synchronise Selection

Building

Online Portal Document Group

Portal Upload Status  Pending Removal  Pending Upload

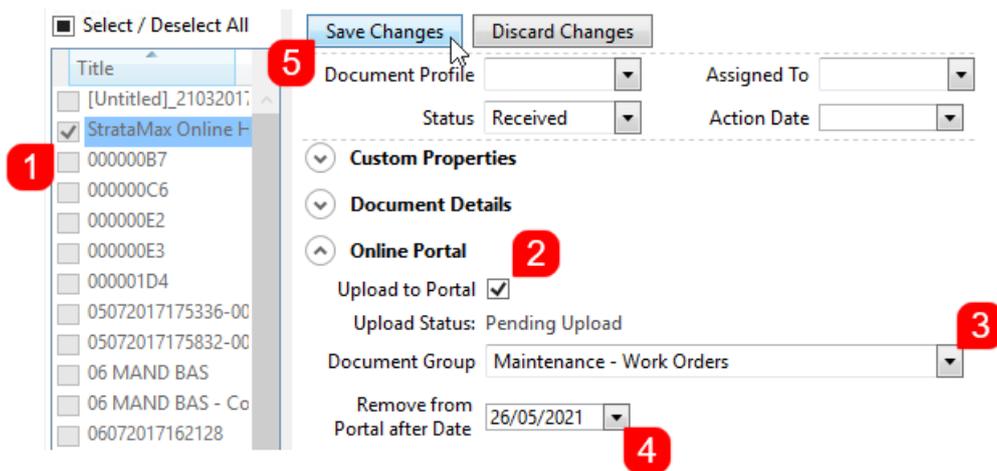
Refresh  4 records displayed

Added Date	Assigned To	Portal Upload Status	Title	Description	Online Portal Document Group
12/07/2017		Pending Upload	Insurance Policy 2017-2018		Group 2 Documents
29/06/2017		Pending Upload	Status Report 01/03/17 to 31		Group 1 Documents
29/06/2017		Pending Upload	Status Report 01/05/17 to 31		Group 1 Documents
04/07/2017		Pending Upload	Status Report 01/06/17 to 31		Group 1 Documents

## 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 completed.

## Synchronise All or Synchronise Selection

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.

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If documents need to be uploaded, removed, or updated immediately, a manual synchronisation should be completed.

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 documents have been identified, select them.
  - The *Shift* key can be used to select a range of documents, and the *Ctrl* key for multiple separate documents.

Online Portal Uploads

Review documents that have been selected to be available on the StrataMax Online Portal. The synchronise buttons will upload or remove documents immediately

**Synchronise All** **Synchronise Selection**

Building

Online Portal Document Group

Portal Upload Status  Pending Removal  Pending Upload

4 records displayed

Added Date	Assigned To	Portal Upload Status	Title	Description	Online Portal Document Group
29/06/2017		Pending Upload	Status Report 01/03/17 to 31		Group 1 Documents
29/06/2017		Pending Upload	Status Report 01/05/17 to 31		Group 1 Documents
04/07/2017		Pending Upload	Status Report 01/06/17 to 31		Group 1 Documents
12/07/2017		Pending Upload	Insurance Policy 2017-2018		Group 2 Documents

4. Click *Synchronise All* for all documents or *Synchronise Selection* for the highlighted documents only.

5. Click *Refresh* once complete and the documents should be removed from the 'Pending Upload' status.

Change the *Portal Upload Status* to *Uploaded* to check that the documents are now uploaded to the StrataMax Portal.

## 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.

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 title is 'Document' with a subtitle 'This is the title field that displays on Portal'. The form includes 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' (expanded) 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 several collapsed sections: 'Invoice Details', 'Document Source', 'File Details', and 'References'.

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*.

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"/>

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.

Administration

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

Documents

Add Documents

Administration

### Profiles

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

AGM Minutes

Articles  
Committee Minutes  
House Rules  
Insurance Certificate of Currency  
Invoices  
Newsletter for Residential Reports

Name: AGM Minutes

Description: AGM Minutes

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

Document Details

Online Portal

Show this section expanded

Upload to Portal

Document Group: **AGM Minutes**

Remove From Portal After: 7 Years